Halogen User Guide

Human Resources

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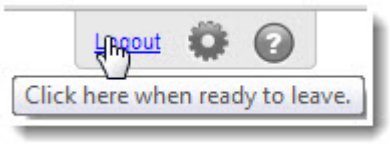
Logging in to Halogen

Ending a session

Halogen contains confidential data. As a security measure, you should sign out of Halogen session correctly by clicking *Logout* in the upper right corner of the screen.

Click on Logout.



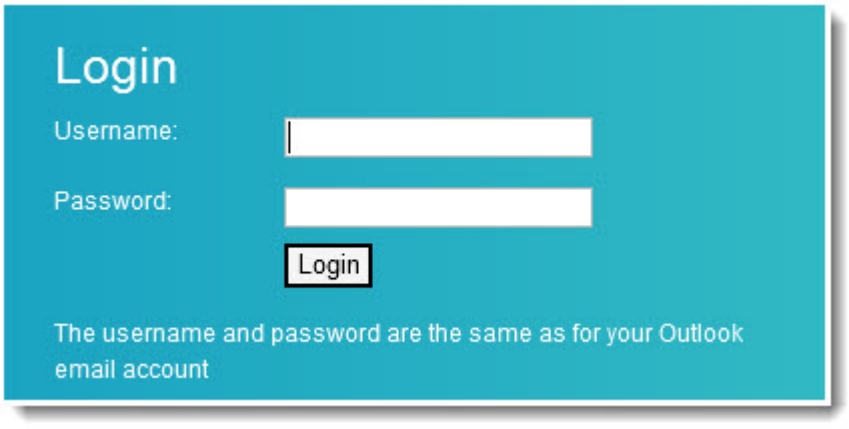
Immediately after logging out, you will be taken back to the login page.

Starting a session

Session length is limited to two hours. Once you are logged in, you can remain logged in for two consecutive hours. After two hours, you are automatically logged out.

1. Open Halogen.

2. Enter your user Outlook name.



3. Enter your Outlook password.

4. Click *Login*.

Introduction to Halogen

Introduction

This guide is designed to help you learn how to use Halogen and to act as a reference manual.

Why Halogen?

Halogen is a Web-based application for managing performance through the use of electronic forms and automated processes.

With Halogen, users can:

1. Set annual goals, indicate probationary periods, schedule mid-cycle meetings and complete annual performance evaluations for contract and regular staff through the use of forms.
2. Access the appropriate forms, based on their user type.
3. Automatically manage tasks to be completed, based on their user type.
4. Schedule automated email reminders to staff about completing tasks in Halogen.
5. Produce reports in real time.

User types

User types are tied to the position a staff member holds.

1. Employee: A staff member responsible for completing the goal-setting forms and the semi-annual and annual evaluation forms.
2. Supervisor: A staff member with direct-report employees.
3. Administrator: A Human Resources employee responsible for managing Halogen.

List of HR Administrators

The HR Administrators of each faculty and service make sure that all steps of the Performance Management and Development Program process meet the deadlines.

They are as well the key contacts for their faculty or service employees wishing to make changes into Halogen.

Organization	Faculty or Service	Name	Email
11	Telfer School of Management	Marc Albert	malbert@uottawa.ca
12	Faculty of Arts	Louise Boisvert	lboisver@uottawa.ca
14	Faculty of Education	Céline Morin	celinem@uOttawa.ca
15	Faculty of Medicine	Alexandre Messager	amessage@uottawa.ca
16	Faculty of Health Sciences	Tanya Elese	tmutatay@uottawa.ca
17	Faculty of Sciences	Carol Riordan	carol@uottawa.ca
18	Faculty of Engineering	Silvana Gandolfini	sgandolf@uottawa.ca
19	Faculty of Social Sciences	Sylvie Desrochers	sdesroch@uottawa.ca
20	Faculty of Graduate and Postdoctoral Studies	Yudy Bengoa	ybengoa@uottawa.ca
21	Faculty of Law - Civil Law	Pierre Thibault	pierre.thibault@uOttawa.ca@uottawa.ca
22	Faculty of Law - Common Law	Nicole Desnoyers	ndesnoye@uottawa.ca
23	Library	Jean-Philippe Gagnon	jgagno2@uottawa.ca
24	International Office	Alain Lagacé	alagace@uottawa.ca
25	Center for Continuing Education	Serge Blais	sblais@uottawa.ca
26	Human Rights Center	Viviana Fernandez	vfernand@uottawa.ca
28	Research Management Services	Mélanie Sabourin	Melanie.Sabourin@uottawa.ca
29	Co-operative Education Programs	Manon Racine	manracin@uottawa.ca
30	Office of the Registrar	Lynn-Marie McCarthy	lmccarth@uOttawa.ca
31	Financial Aid and Awards	Lynn-Marie McCarthy	lmccarth@uOttawa.ca
32	Human Resources	Monique Malo	malo@uottawa.ca

Organization	Faculty or Service	Name	Email
34	Financial Planning	Darlene Avelar	dlapoint@uottawa.ca
35	Financial Resources	Darlene Avelar	dlapoint@uottawa.ca
36	Procurement	Darlene Avelar	dlapoint@uottawa.ca
37	Computing and Communications	Michelle Sultan	msultan@uottawa.ca
38	Teasury and Pension Fund	Darlene Avelar	dlapoint@uottawa.ca
39	VRA Financial Resources	Darlene Avelar	dlapoint@uottawa.ca
40	Physical Resources	Valentin Bachner	vbachner@uOttawa.ca
41	Protection Services	Nathalie Watson	nwatson@uOttawa.ca
42	TLSS	Denis Bouchard	dbouchar@uottawa.ca
43	Office of Risk Management	Pierrette Gouin	pgouin@uottawa.ca
44	Food Services	Patrick Genest	pgenest@uottawa.ca
45	External Relations	Diane Comtois	dcomtois@uottawa.ca
46	CGCE	Cynthia Irakoze	cynthia.irakoze@uOttawa.ca
51	Community Life Service	Marc Duval	mduva2@uottawa.ca
52	VRA Student Services	Éliette Portelance	eportela@uottawa.ca
53	Conventions and Reservations	Patrick Genest	pgenest@uottawa.ca
54	SASS	Vincent Beaulieu	vbeaulie@uottawa.ca
55	Sports Services	Lucie Laroche	llaroche@uottawa.ca
56	Animal Care and Veterinary Service	Marylee McCormick	mmccormi@uottawa.ca
62	Office of the Presidents and Vice-Presidents	Cynthia Irakoze	cynthia.irakoze@uOttawa.ca
70	Office of the Presidents and Vice-Presidents	Cynthia Irakoze	cynthia.irakoze@uOttawa.ca
71	Office of the Presidents and Vice-Presidents	Cynthia Irakoze	cynthia.irakoze@uOttawa.ca

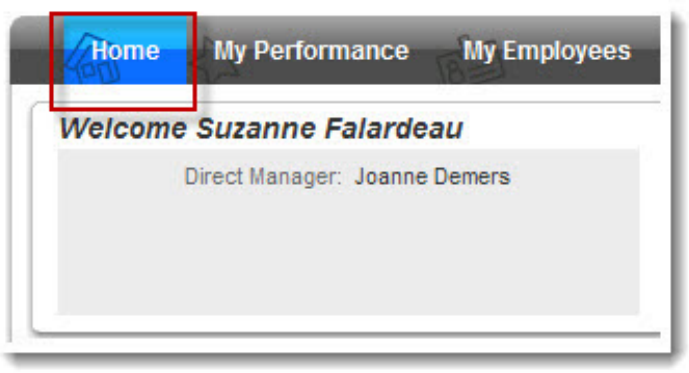
Organization	Faculty or Service	Name	Email
72	Office of the Presidents and Vice-Presidents	Cynthia Irakoze	cynthia.irakoze@uOttawa.ca
73	Office of the Presidents and Vice-Presidents	Cynthia Irakoze	cynthia.irakoze@uOttawa.ca
74	Office of the Presidents and Vice-Presidents	Cynthia Irakoze	cynthia.irakoze@uOttawa.ca
75	Office of the Presidents and Vice-Presidents	Cynthia Irakoze	cynthia.irakoze@uOttawa.ca
84	Strategic Enrollment Management	Lynn-Marie McCarthy	lmccarth@uOttawa.ca

The Halogen interface

Finding your way around

Here are a few helpful hints for finding your way around in Halogen.

1. A top tab highlighted in blue indicates the name of the page you are on.



2. Text in blue indicates a link, which opens in another window

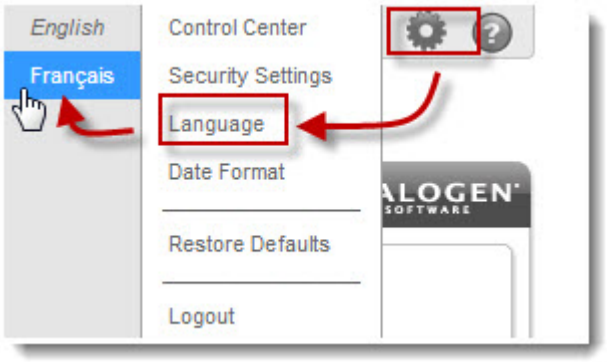
.

Changing the interface language

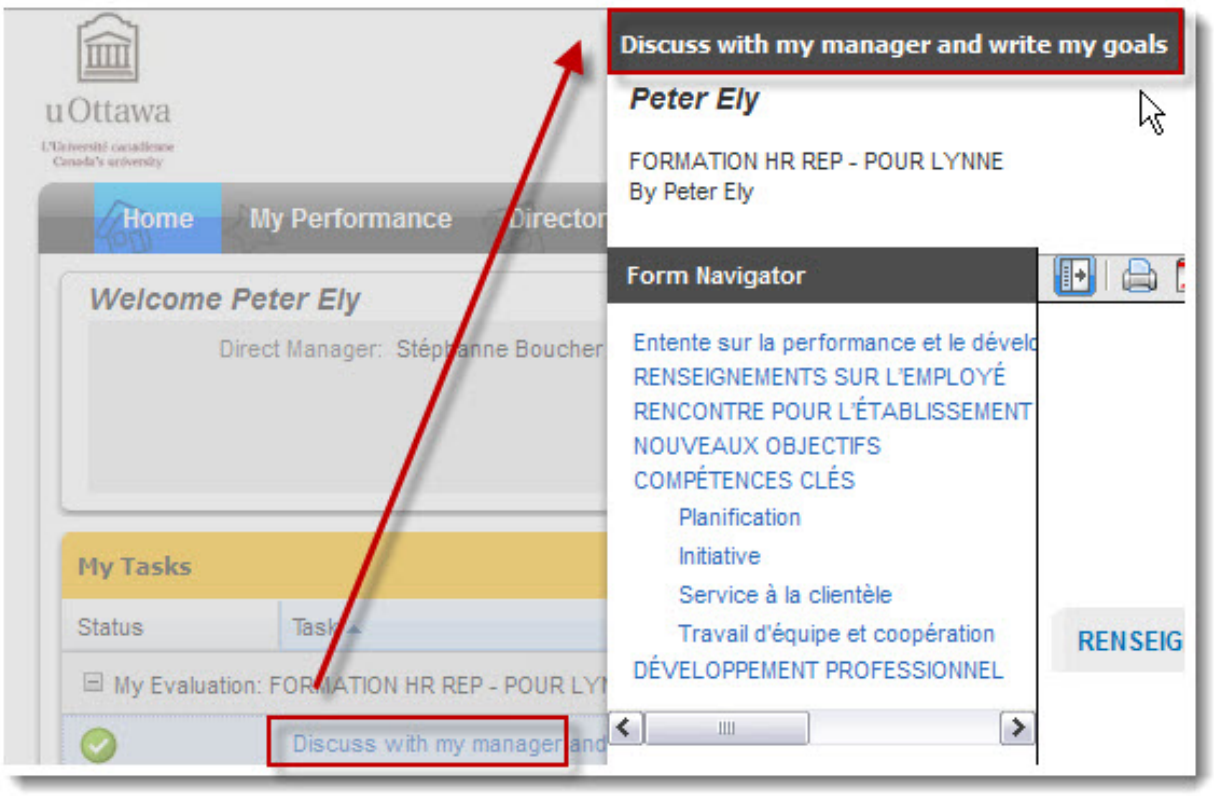
This application is available in both official languages, so you can work in the language of your choice.

The interface changes to French as soon as you select Français. However, when you change the language you are taken back to the Home page and not to the page

you were on when you changed the language.



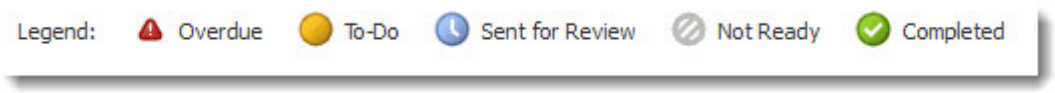
The default language is set when a user account is created. Forms for the user will always appear in the user's preferred language. Whether you are using the French or the English interface, however, forms are always displayed and published in the preferred language chosen for the user when the account was created.



Tasks

In Halogen, steps to be completed in the ongoing process are considered "tasks." Employees' tasks may be, for example, entering their goals in an online form, and submitting them to their supervisor for review. Supervisors, of course, have a greater number of tasks since they must enter their own goals in addition to reviewing and approving the forms submitted by each employee that reports to them. An icon indicates the status of each task.

Task status icons:



Icon	Meaning
	Task past due and requires attention.
	Task requires your attention but is not past due.
	Task awaiting third party review.
	Task is not ready for your participation.
	Task is completed and no longer requires your attention.
	Task requiring attention of another user but not past due.

Interface icons

Icon	Function or meaning
	Links a goal to an organizational goal.
	Erases a title, description, due date or success indicator of a goal.
	Indicates the goal is linked to an organizational goal.
	Indicates a date field that opens a calendar to enter a date.
	Starts spell checker. You will be asked to set the language.
	Adds a note.
	Expands or collapses the form navigator pane.
	Prints the form.

Icon	Function or meaning
	Creates a PDF version of the form.
	Built-in language checker reviews text for any offensive or potentially embarrassing words or statements and suggests alternatives.
	Split screen function.
	Closes the form.

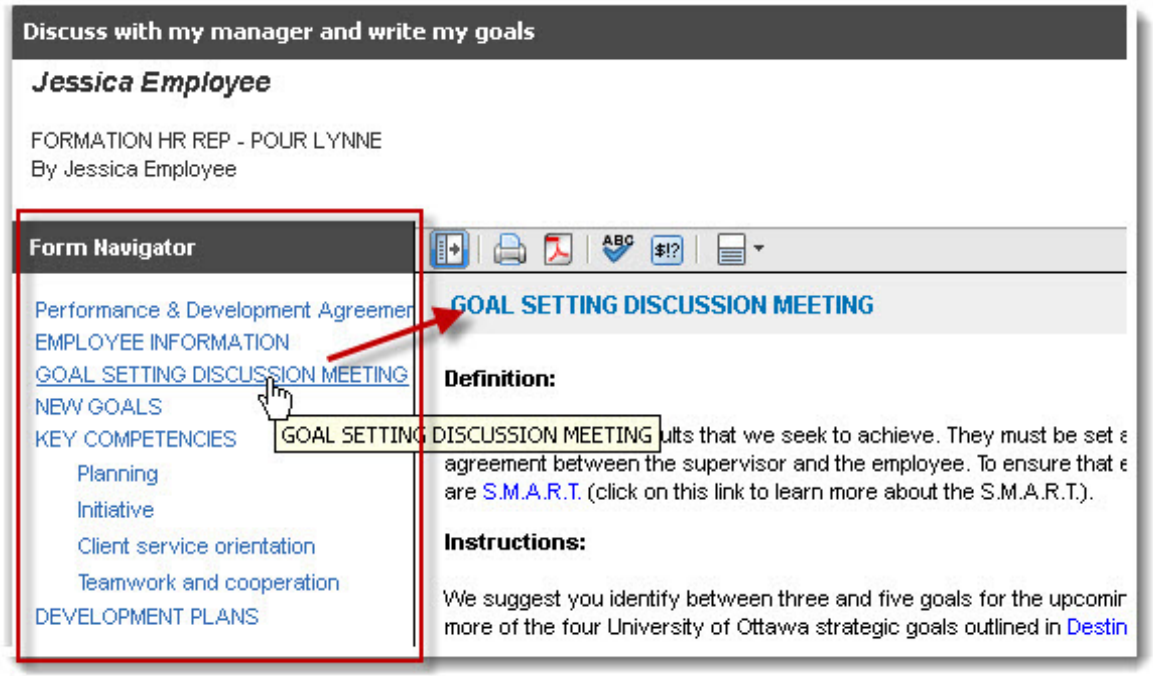
Help

Online help is available in Halogen. Simply click *Help* in the upper right corner.

The form navigator pane

Each form (performance evaluation, goal setting, end of probationary period, mid-year evaluation, etc.) has multiple sections. The form navigator pane allows you to easily and quickly move between sections.

The form navigator pane appears to the left of the form. You can use either the form navigator or the scroll bar to move from one section of a form to another, although the navigator pane allows you to do so more quickly.

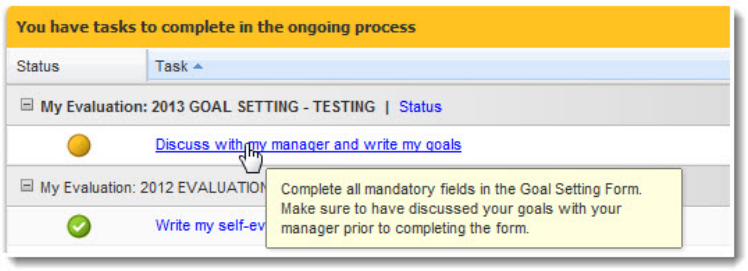

Discuss with my manager and write my goals
Jessica Employee
FORMATION HR REP - POUR LYNNE
By Jessica Employee
Form Navigator
Performance & Development Agreemer
EMPLOYEE INFORMATION
GOAL SETTING DISCUSSION MEETING
NEW GOALS
KEY COMPETENCIES
Planning
Initiative
Client service orientation
Teamwork and cooperation
DEVELOPMENT PLANS
GOAL SETTING DISCUSSION MEETING
GOAL SETTING DISCUSSION MEETING
Definition:
ults that we seek to achieve. They must be set a
agreement between the supervisor and the employee. To ensure that e
are S.M.A.R.T. (click on this link to learn more about the S.M.A.R.T.).
Instructions:
We suggest you identify between three and five goals for the upcomir
more of the four University of Ottawa strategic goals outlined in Destin

Main functions

Tasks to complete

The You have tasks to complete in the ongoing process pane provides employees and supervisors with an overview of any tasks they have yet to complete (their own tasks and those of any employees they have).

Users can display these tasks in grouped view, task view or in a single list. In addition, each column can be sorted in ascending or descending order.


You have tasks to complete in the ongoing process
Status
Task
My Evaluation: 2013 GOAL SETTING - TESTING | Status
Discuss with my manager and write my goals
My Evaluation: 2012 EVALUATION
Write my self-ev
Complete all mandatory fields in the Goal Setting Form. Make sure to have discussed your goals with your manager prior to completing the form.

This pane also displays the status and due date of tasks.

Users will usually receive an email indicating a task has to be started or completed. The email message can also include the user's log-in name, temporary password and a link to launch Halogen. Once logged in, the user sees a quick overview of any tasks requiring action.

When a given process is complete and the supervisor has signed the form off, Halogen posts the form in the *Evaluation* section of the My Performance page.

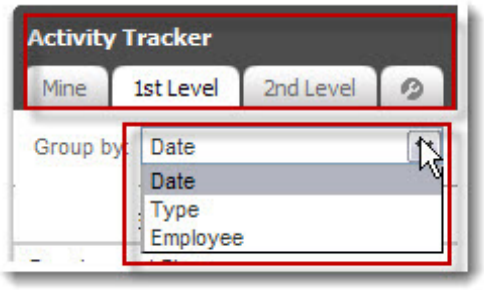
Activity tracker

The activity tracker pane appears on the right-hand side of the home page. It lists journal notes, appraisals and documents that have been updated in My Performance. Items can be sorted by date (newest to oldest) or by type.

1. Changes made to goals and development plans appear only after the goal setting process has been completed, i.e., after the supervisor has given final approval.
2. The group of tabs that displays in the activity tracker depends on the user type.
    a. Employees: *Mine*.
    b. First-level supervisors: *Mine* and *1st level*.

c. Second-level supervisors *Mine*, **1st Level** and **2nd Level**.

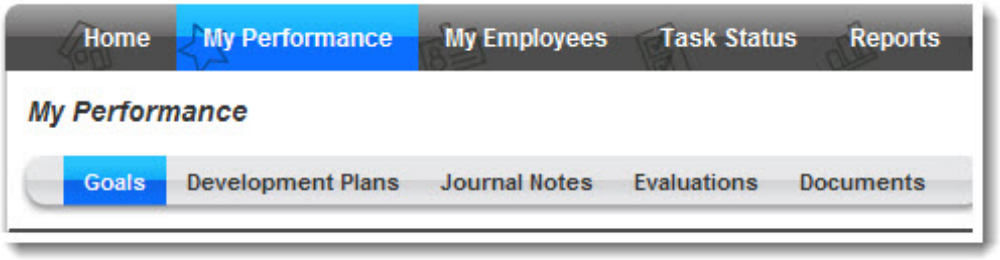
3. Activities in the Mine tab can be grouped by date or type.
4. Activities of direct reports can be grouped by date, type or employee.



My Performance

My Performance

My Performance is a centralized portal where a user can access and update performance information in the following sections:



- Goals
- Adding a development plan
- Adding a journal note
- Evaluations
- Documents

Supervisors have access to these same five sections in the My Employees page.

Important:
If you add goals or development plans in My Performance, this information is not automatically added to the goal setting form completed at the start of the performance evaluation cycle. As a result, these goals and development plans will not be formally evaluated at the end of the cycle.

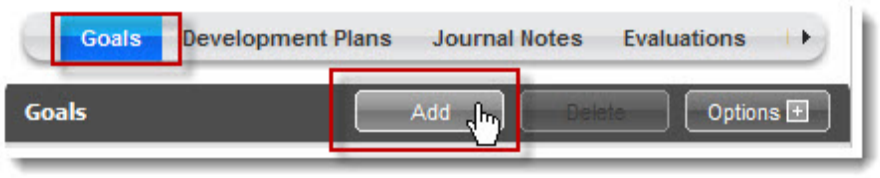
Adding a goal

A goal is a target that an employee is encouraged to reach, generally within a specified period of time. Goals can be added by both employees and supervisors. An employee can also add goals after an evaluation has taken place. Employees and supervisors can consult the employee's goals at any time. Goals entered in the goal setting form will appear in this section once the goal setting process has been completed.

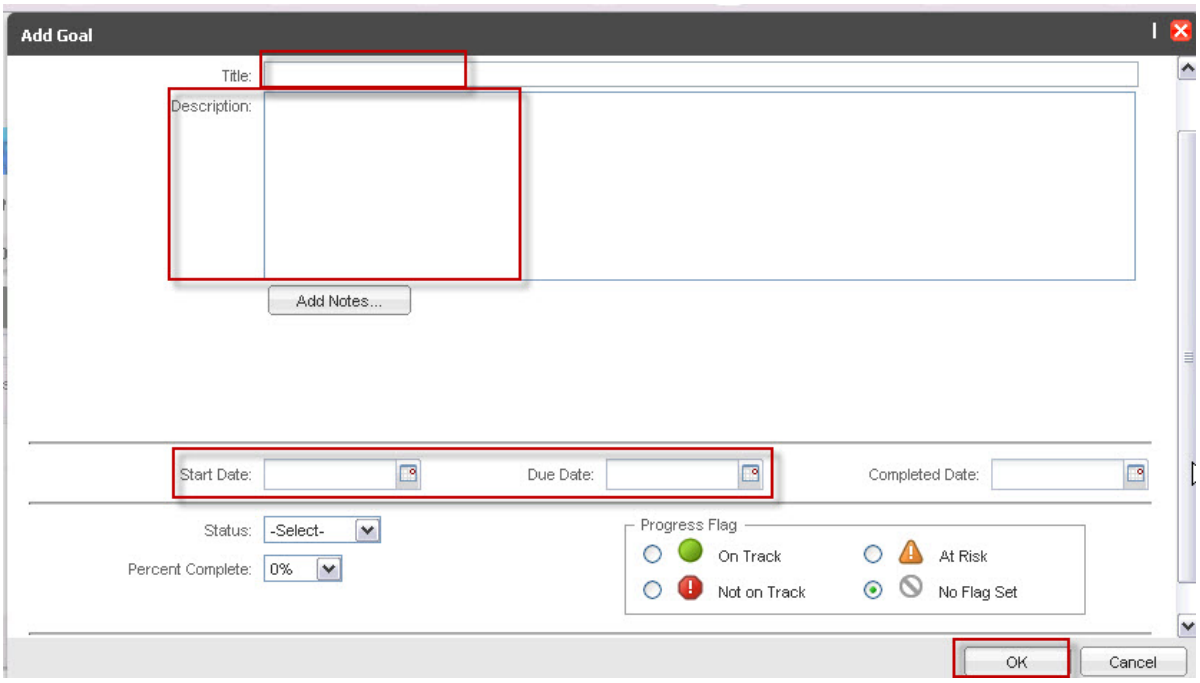
1. Supervisors: click My Employees and then the name of the employee for whom a goal is to be added.

2. Click *Goals*.
   NB: The objectives you added will not be kept in the goal setting form that you completed at the beginning of the cycle.

3. Click *Add*.



4. Enter a title in the Title field. .



5. Provide a detailed description of the goal in the Description field.

6. Click on the calendar icon next to the Start Date field and select a start date.

7. Click on the calendar icon next to the Due Date field and select a due date.

8. Click *OK*.

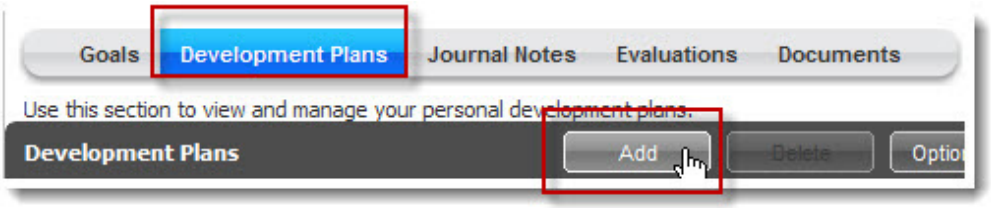
Adding a development plan

A development plan added here will not be added to the goal setting form completed at the start of the cycle.

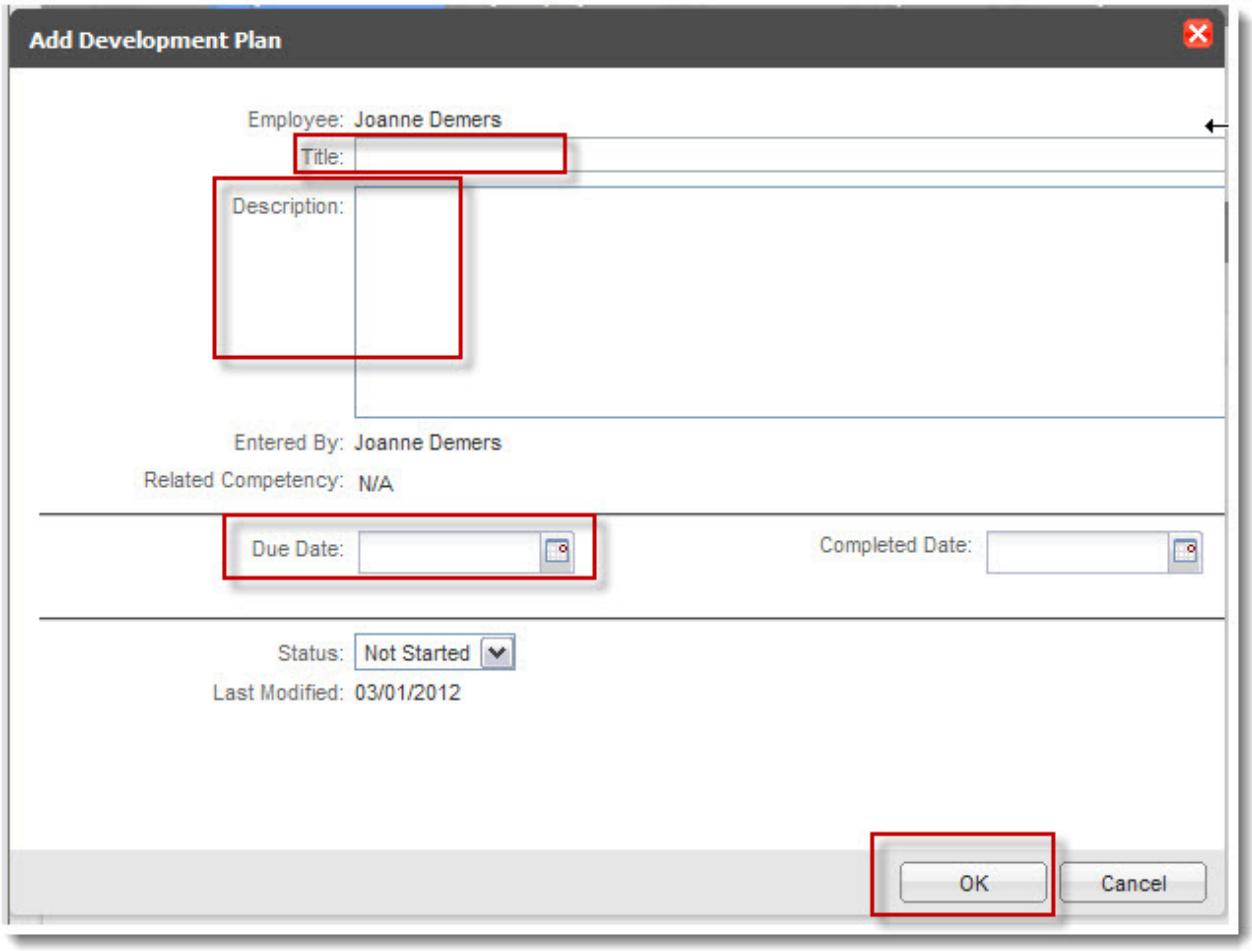
1. Supervisors: click My Employees and then the name of the employee for whom a development plan is to be added.

2. Click Development Plans.

3. Click *Add.*



4. Enter a title in the Title field.



5. Provide a detailed description of the development plan in the Description field.

6. Click on the calendar icon next to the Due Date field and select a due date.

7. Click *OK*.

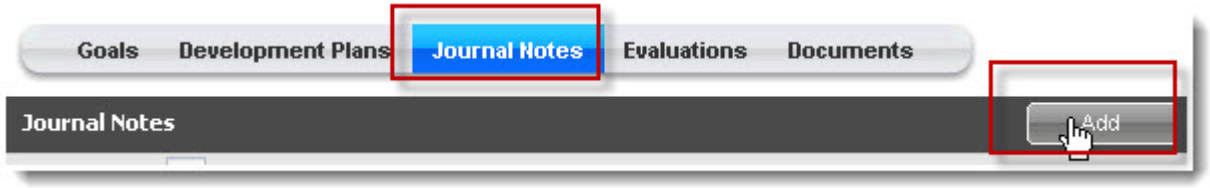
Adding a journal note

Employees can use the journal notes section to track their achievements during the year, which can be helpful at evaluation time. For example, a journal note could be added to note registrations increased by 2 %.

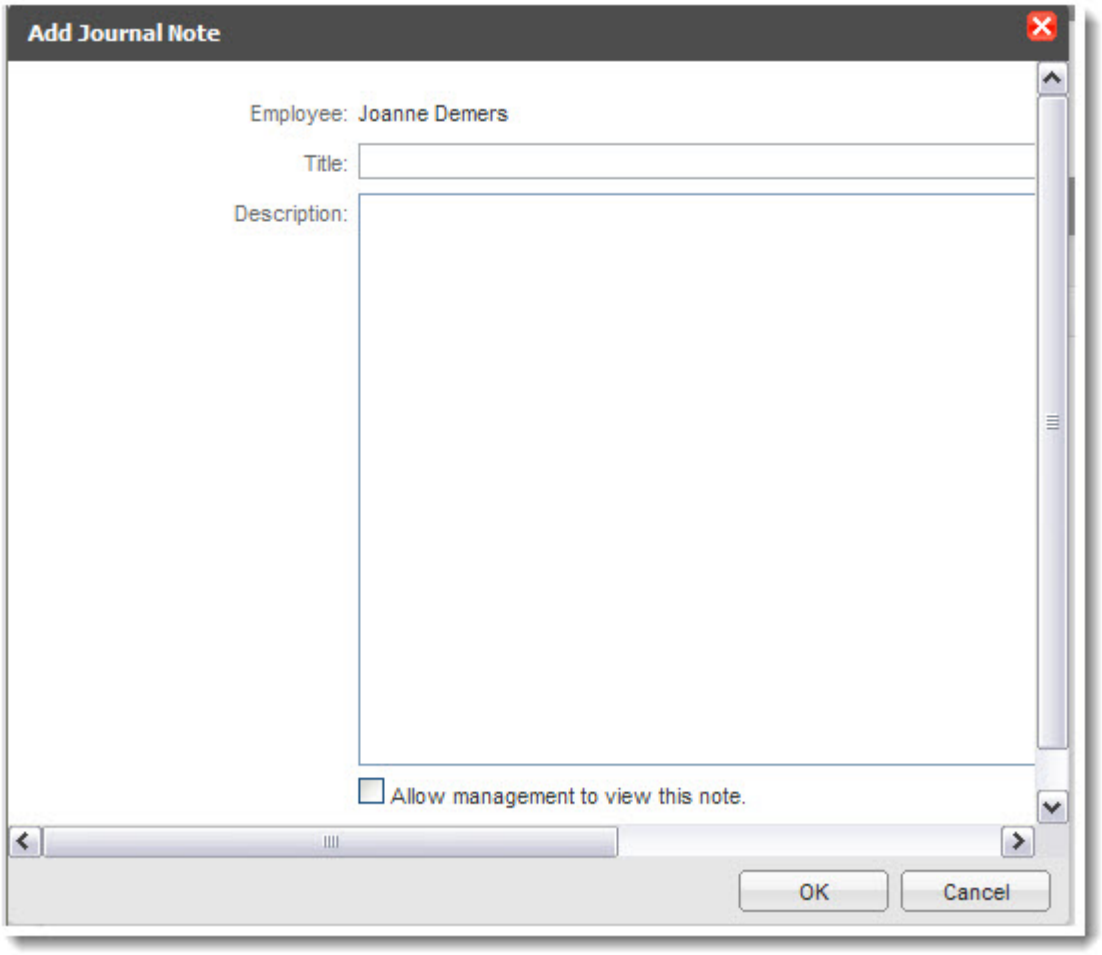
1. Supervisors: click My Employees and then the name of the employee for whom a journal note is to be added.

2. Click Journal Notes.

3. Click *Add*.



4. Enter a *title* for the note in the Title field.



5. Enter the journal note details in the Description.

6. Employees who arrived at this section through the My Performance page can check the box next to Allow management to view this note if they wish to allow their supervisor to see this note. Supervisors who arrived at this section through the My Employees page can check the box next to Let the employee view this note if they wish to allow their employee to see this note.

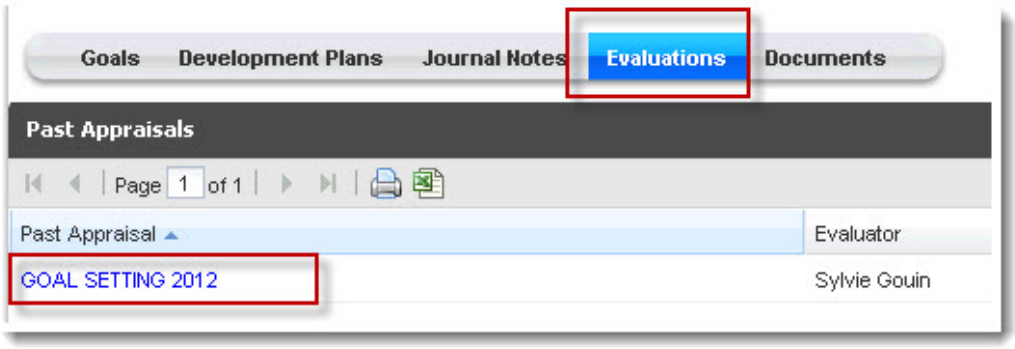
7. Click *OK*.

Evaluations

Supervisors may review their own forms and evaluations as well as those of their employees at any time. This allows supervisors to monitor both personal and employee progress.

Note:

Past appraisals have not been imported into Halogen. Therefore, 2012 is the first annual performance evaluation cycle to be recorded in Halogen. Once the 2012 goal setting process is complete, this form will appear in the Evaluations section.

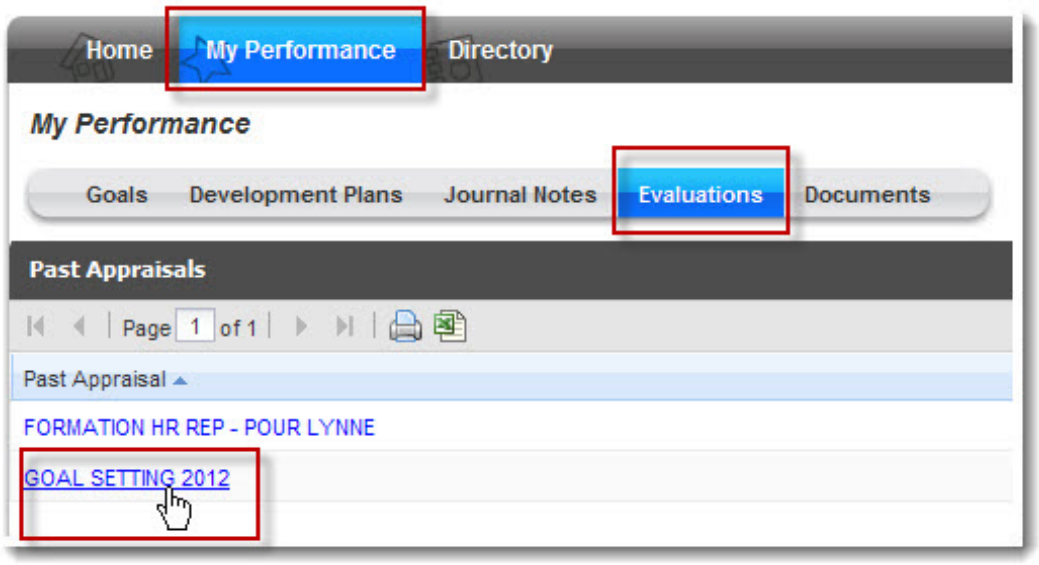


Print a completed form

1. Click the Ma Performance tab.

2. Click the Evaluations tab.

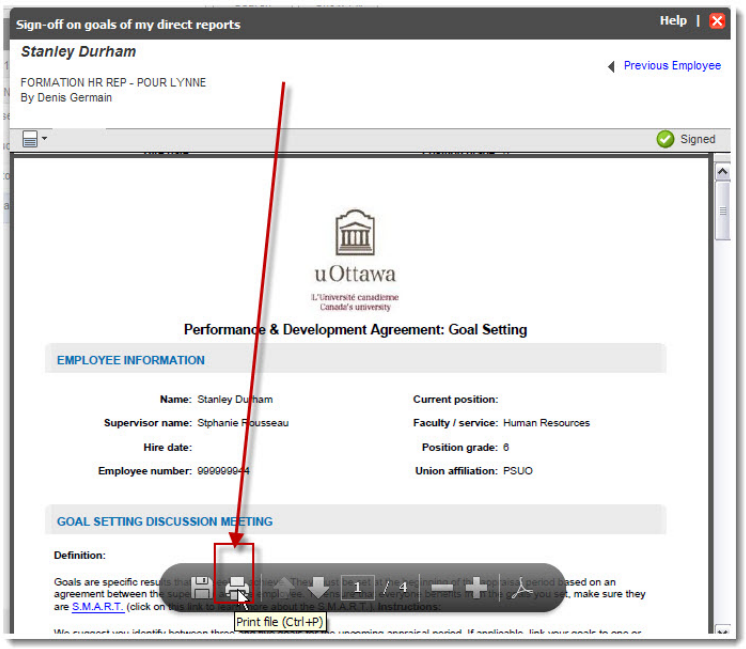
3. Click on the name of the form to be printed in order to create a PDF document.



4. Once the PDF form appears, place your curser at the bottom of the document to view the translucent Adobe toolbar.

5. Click on the printer icon on the toolbar.

6. Click *Print* to send your document to the printer.



Adding a document

Employees can add, consult and delete performance-related documents for themselves. Supervisors can add, consult and delete performance-related documents for themselves and their employees.

Supervisors can set document visibility parameters (access) for any documents they add for an employee by selecting the Employee and Management or the Management radio button.

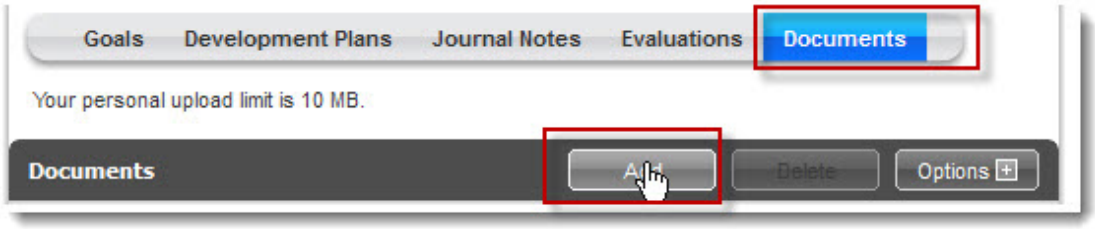
Users can add documents with the following filename extensions :

- .PDF
- .DOC
- .DOCX
- .TXT
- .XLS
- .XLSX
- .JPG

- .GIF
- .BMP

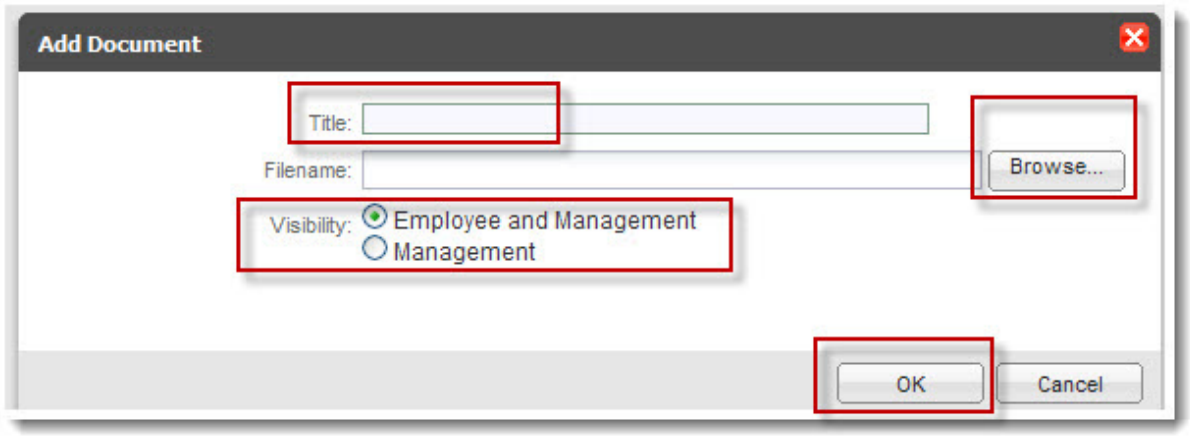
1. Click the Documents tab.

2. Click *Add*.



3. Enter a title for the document in the Title field.

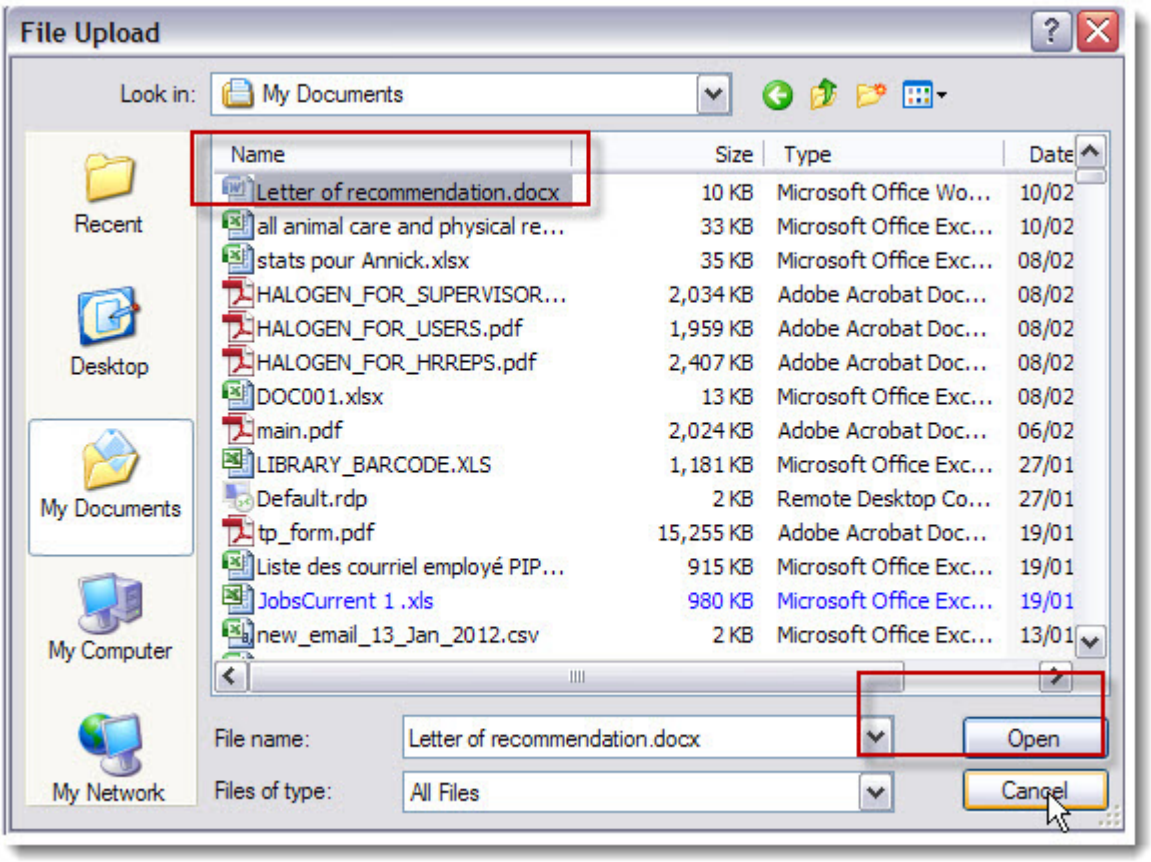
4. Click *Browse*.



5. Locate and click on the document to be added.

6. Click on the Employee and Management or the Management radio button to set document visibility (access).

7. Click *Open*.


File Upload
Look in:
My Documents
Name
Size
Type
Date
Letter of recommendation.docx 10 KB Microsoft Office Wo... 10/02
all animal care and physical re... 33 KB Microsoft Office Exc... 10/02
stats pour Annick.xlsx 35 KB Microsoft Office Exc... 08/02
HALOGEN_FOR_SUPERVISOR... 2,034 KB Adobe Acrobat Doc... 08/02
HALOGEN_FOR_USERS.pdf 1,959 KB Adobe Acrobat Doc... 08/02
HALOGEN_FOR_HRREPS.pdf 2,407 KB Adobe Acrobat Doc... 08/02
DOC001.xlsx 13 KB Microsoft Office Exc... 08/02
main.pdf 2,024 KB Adobe Acrobat Doc... 06/02
LIBRARY_BARCODE.XLS 1,181 KB Microsoft Office Exc... 27/01
Default.rdp 2 KB Remote Desktop Co... 27/01
tp_form.pdf 15,255 KB Adobe Acrobat Doc... 19/01
Liste des courriel employé PIP... 915 KB Microsoft Office Exc... 19/01
JobsCurrent 1 .xls 980 KB Microsoft Office Exc... 19/01
new_email_13_Jan_2012.csv 2 KB Microsoft Office Exc... 13/01
Recent
Desktop
My Documents
My Computer
My Network
File name:
Letter of recommendation.docx
Open
Files of type:
All Files
Cancel

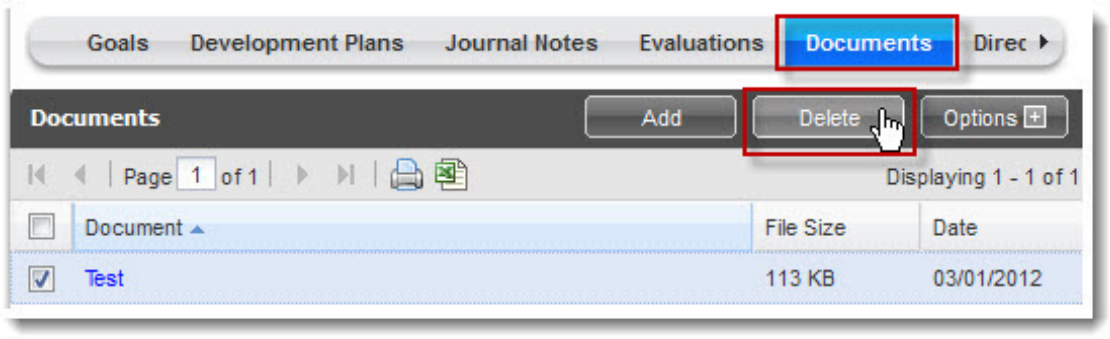
8. Click *OK*.

Deleting a document

You can delete a document from the Documents section.

1. If you are a supervisor, click My Employees and then the name of the employee whose document is to be deleted.

2. Click the Documents tab.



3. Put a checkmark in the box next to any documents to be deleted.

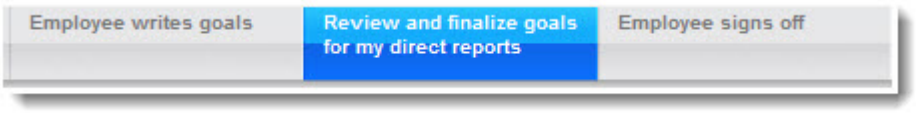
4. Click *Delete*.

5. Click OK.

Goal setting

Setting goals

The process of setting goals is broken down into tasks done by either the employee or the employee's supervisor.



Start of the goal setting process: The supervisor schedules a meeting with the employee to set goals for the coming year, to identify the behaviours necessary to maintain or improve performance levels in each competency and to draw up a development plan that will allow the employee to achieve their goals and reach the required competency levels.

The employee must:

1. Enter the date of the meeting with the supervisor.
2. Add up to five goals
3. Enter the specific behaviours for each competency necessary in order to maintain or improve performance levels in each competency over the next evaluation period.
4. Enter a development plan.
5. Save the draft form (can be modified up until it is submitted for approval).
6. Submit the form for approval. The employee can no longer modify the form.

The supervisor must:

1. Review and finalize the employee's draft form. At this step, the supervisor can write directly in the form to make necessary changes.
2. If necessary, add comments to key competencies.
3. If necessary, add comments to the development plan.
4. Save the form.
5. Complete the form

End of the goal setting process

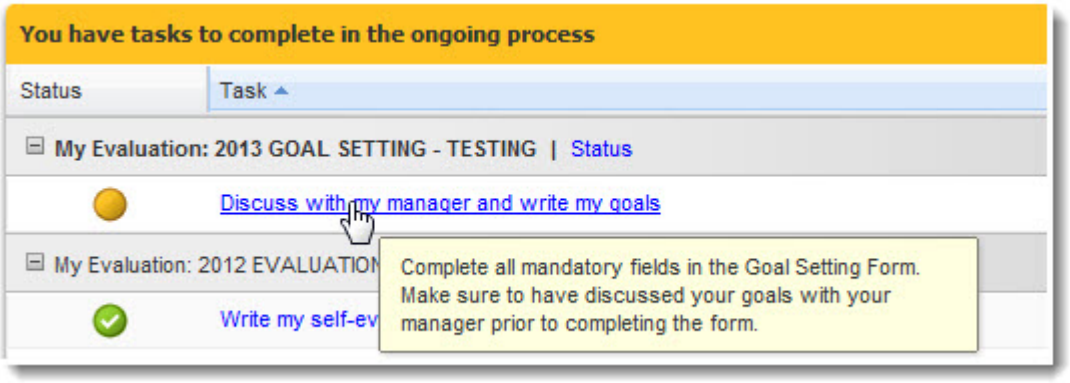
The employee approves the goal setting form. The form is now marked completed.

Meeting to discuss goals

The first step in completing an annual evaluation is the employee–supervisor meeting in order to establish goals. Once the meeting has taken place, the employee drafts personal goals in Halogen.

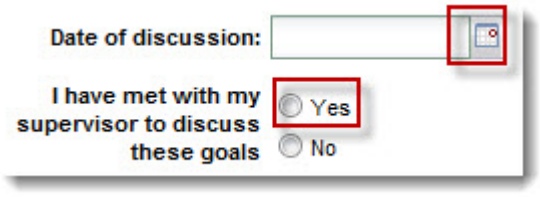
Drafting goals (employees):

1. Click *Discuss with my manager and write my goals*.


You have tasks to complete in the ongoing process
Status
Task
My Evaluation: 2013 GOAL SETTING - TESTING | Status
Discuss with my manager and write my goals
My Evaluation: 2012 EVALUATION
Write my self-ev
Complete all mandatory fields in the Goal Setting Form. Make sure to have discussed your goals with your manager prior to completing the form.

2. Once the goal setting form opens, click the calendar icon in the meeting section, next to the *Date of discussion* field and select a meeting date

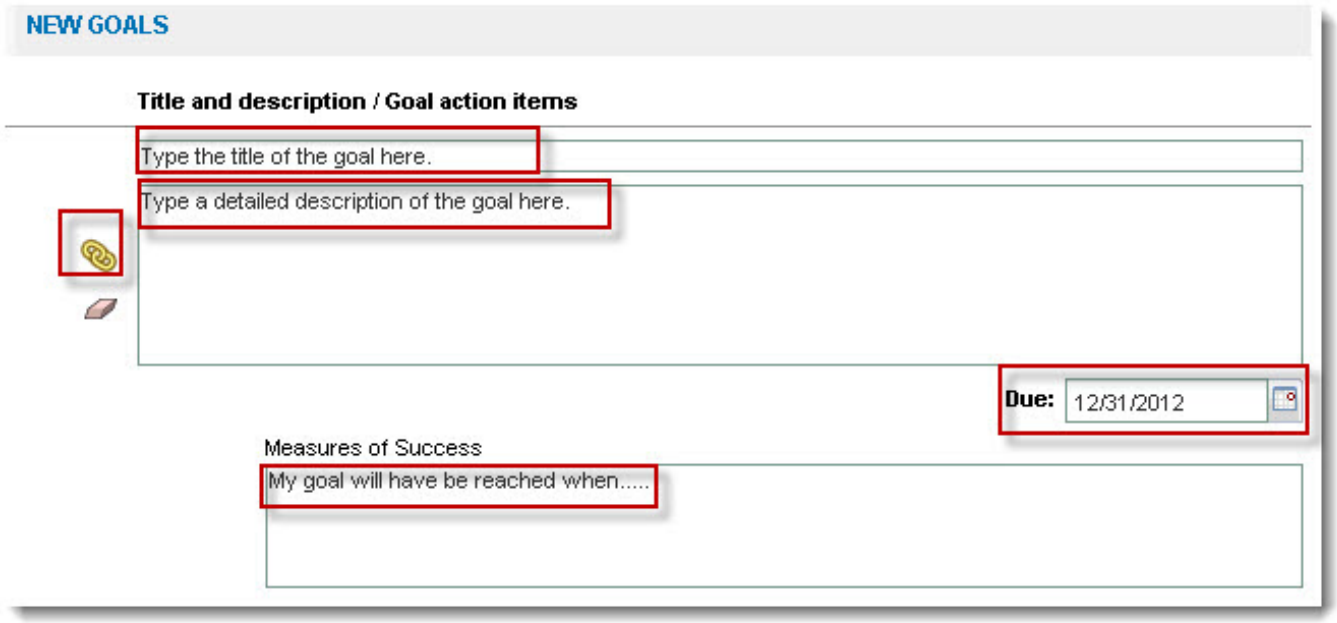
3. Select Yes to confirm that the meeting was held and that the goals were discussed with the supervisor



Adding a goal

All employees must write up their goals at the start of the annual performance management cycle. Halogen allows the employee to enter up to five goals. The steps below describe the process for drafting and editing a goal (for employees) and for editing a goal (for supervisors):

1. Under the heading Title and description / Goal action items, type the title of the first goal.


NEW GOALS
Title and description / Goal action items
Type the title of the goal here.
Type a detailed description of the goal here.
Due:
12/31/2012
Measures of Success
My goal will have be reached when.....

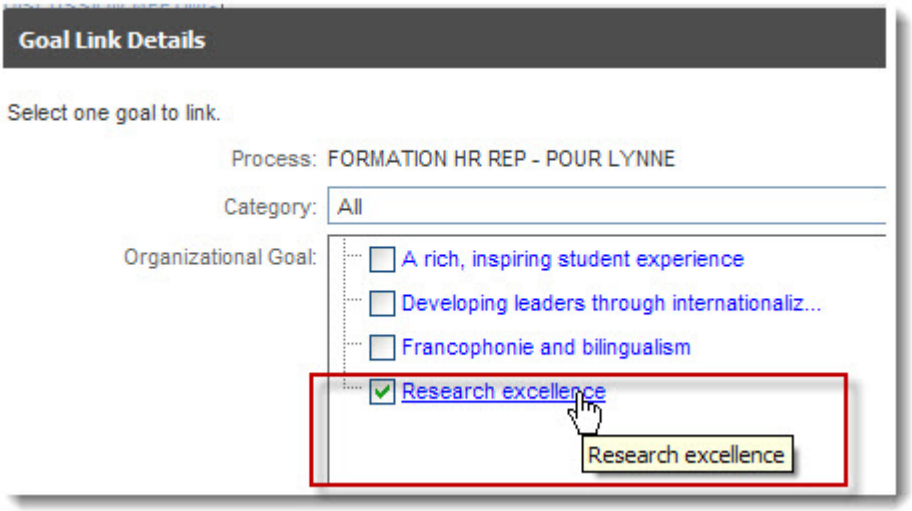
2. In the second box, type a detailed description of the goal.

3. Click the calendar icon next to the Due box and select the required date.

4. In theMeasures of successs box, type one or more indicators.

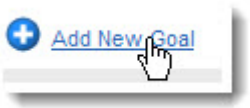
5. Click the chain link icon to link the goal to an organizational goal.

6. Select the organizational goal the employee goal is to be linked to.



7. Click *Link*.

8. To add another goal, click *Add New Goal*.

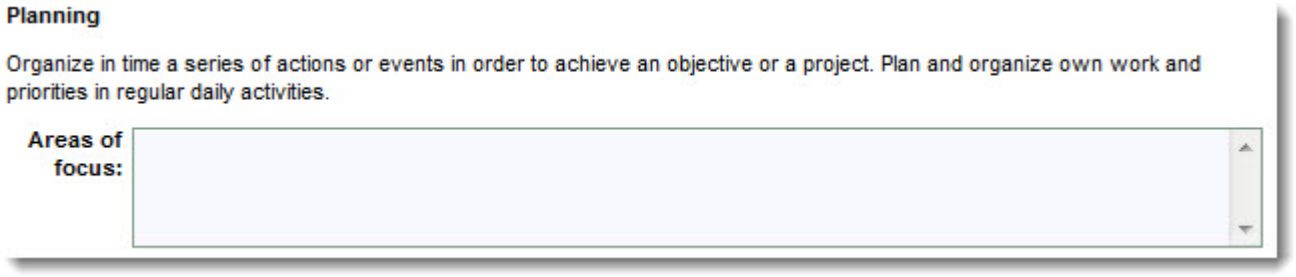


Linking behaviours to key competencies

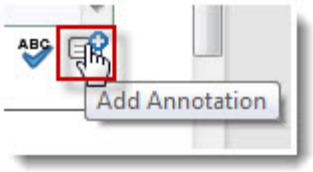
The key competencies section is for recording the behaviours an employee must adopt or maintain in order to improve or remain at their level of performance for each of the four competencies. When a supervisor opens a form submitted by an employee, the

supervisor is able to make changes to the form. Next section describes the steps for an employee to record behaviours.

1. In the Areas of focus box, the employee describes a behaviour that will help them acquire, maintain or improve their level for a given competency.


Planning
Organize in time a series of actions or events in order to achieve an objective or a project. Plan and organize own work and priorities in regular daily activities.
Areas of focus:

2. Click Add Anotation to attach any comments.



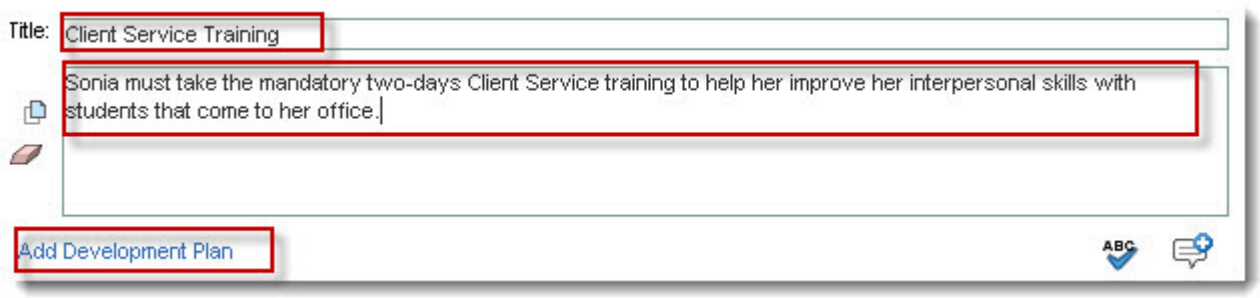
3. Repeat steps 1 and 2 for each of the other competencies.

Adding a development plan

Employees and supervisors can use the development plan section to describe possible training activities that would provide the employee with opportunities for career advancement or help the employee improve their skill level. The development plan can

be completed by either the employee or the employee's supervisor. To add a development plan, follow the steps below.

1. Give the development plan a title.

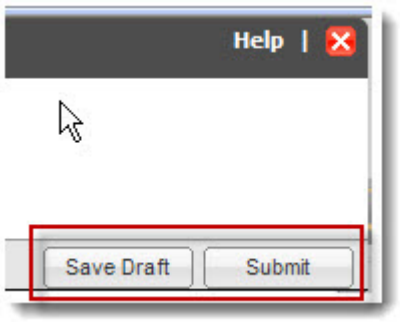

Title:
Client Service Training
Sonia must take the mandatory two-days Client Service training to help her improve her interpersonal skills with students that come to her office.
Add Development Plan

2. Enter a description of the proposed training activity.

Saving the draft version

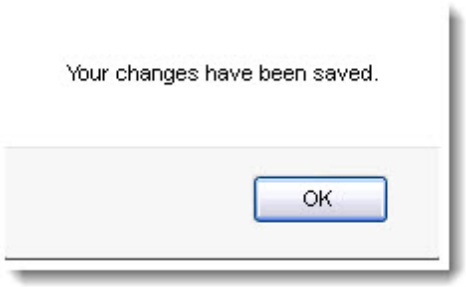
Click *Save Draft* furthering order to save the form and continue editing. When you have finished entering your plan(s), click *Submit*. The form can now be viewed but not changed and is submitted to the supervisor for review and approval.

1. Click *Save Draft*



.

2. Click *OK*

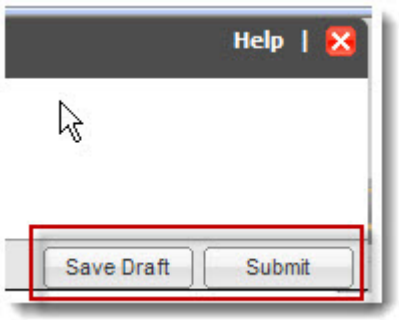


.

Submitting a form for approval

Once there are no further changes to make to the form, it is submitted to the employee's supervisor for review and approval. A supervisor cannot view the form until the employee has submitted it for review and approval.

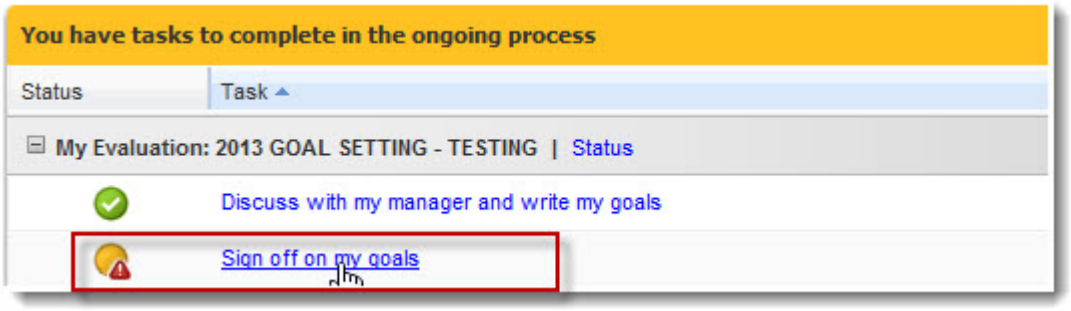
Click *Submit* once there are *no more changes to be made* to the form.



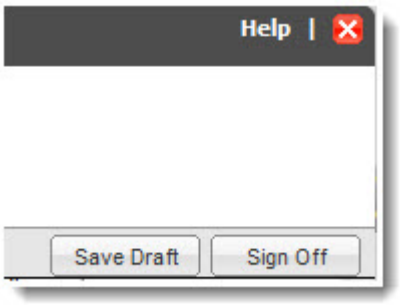
Employee final approval

Once a supervisor has reviewed and approved an employee's goal setting form, the supervisor sends the form to the employee for approval. The employee must:

1. Click *Sign off on my goals*.


You have tasks to complete in the ongoing process
Status
Task
My Evaluation: 2013 GOAL SETTING - TESTING | Status
Discuss with my manager and write my goals
Sign off on my goals

2. Click on Save Draft.

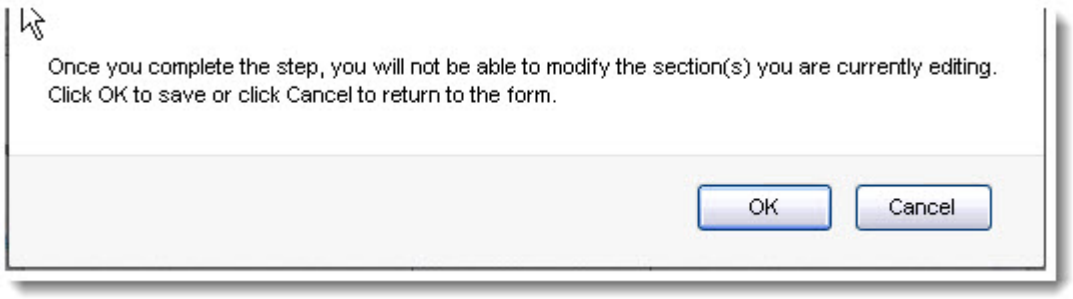


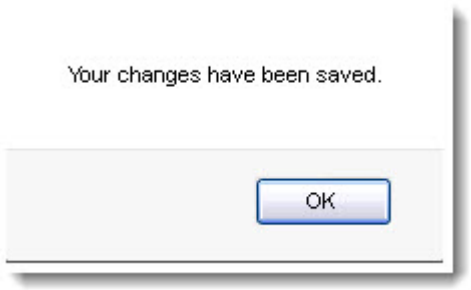
3. Click on OK.

4. Click on Sign Off.

   If you click on Sign Off the form is saved and the process is completed. You cannot modify the form once it has been signed off.

5. Click on OK.

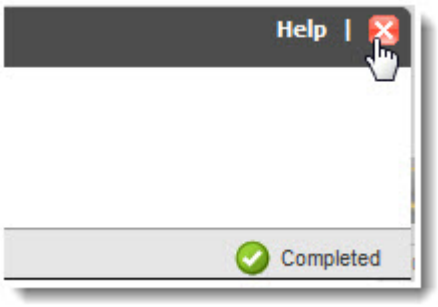

Once you complete the step, you will not be able to modify the section(s) you are currently editing.
Click OK to save or click Cancel to return to the form.
OK
Cancel

6. 

   Click on OK.

   The system will the task with a completed status.

7. Click on the red X to close the form.



Self-appraisal Process

Annual Appraisal Process

1. The year-end process contains many steps that must be completed successively by the employee, the supervisor, the second-level supervisor of the unit. The process contains four steps as illustrated below. The process is completed once the second level supervisor the final approval to the form.

Employee writes self-evaluation
Review and finalize evaluations for my direct reports
Employee sign-off
Second level manager sign-off

   a. Employee write his/her self-evaluation

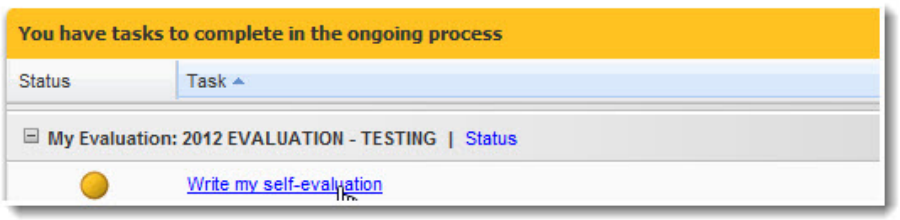
   b. Supervisor revises/writes evaluation, consults with the second-level supervisor and discusses with the employee

   c. Employee approves the evaluation

   d. Second-level supervisor approves the evaluation

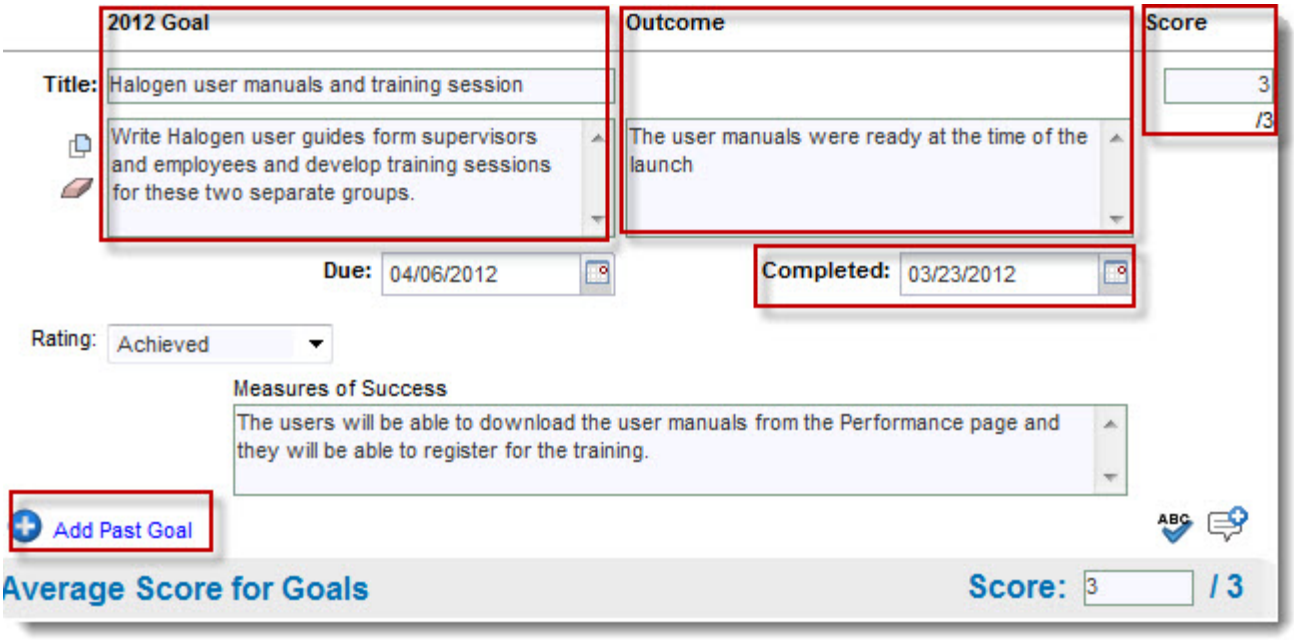
2. The self-appraisal form finalizes the appraisal cycle. This form must be completed by all employees. It is in this form that scores for objectives and competencies are entered.

3. The self-appraisal form is available from the Home tab and you must click on *Write my self-evaluation* to begin the process.


You have tasks to complete in the ongoing process
Status
Task
My Evaluation: 2012 EVALUATION - TESTING | Status
Write my self-evaluation

4. The self-appraisal form allows you to enter goals if you have not previously completed the goal setting form. To enter goals you must click on *Add Past Goal*. However, if you have completed the goal setting form or you have entered goals and/or development plans using the My Performance tab, they will automatically

be imported in the self-appraisal form.



5. If you have filled the goal setting form **but your supervisor has not opened the form**, your goals, competencies and development plan **will have not been added to the annual appraisal form**. It is possible to copy and paste the content of your goal setting form into the annual appraisal form. The following steps explains how to do this.

   a. Click on My Performance tab

   b. Click on Evaluations tab

   c. Click on Goal Setting.

   d. Simultaneously press on the following keyboard keys ***SHIFT CTRL S*** to be able to save your form on your desktop

   e. Select the directory where the file needs to be saved and write a name of your document.

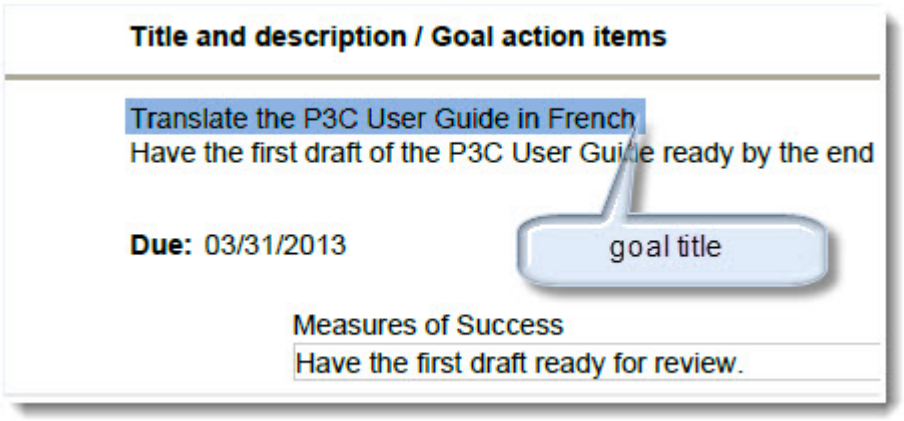
   f. Close the PDF form opened with Halogen by clicking on the red box with the X located in the upper right section of the form.

   g. Click on the Halogen Home tab.

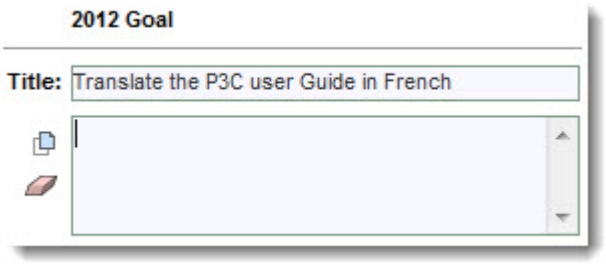
   h. Click on Write my self-evaluation to open the annual appraisal form.

   i. Open the PDF form that you have saved on your desktop.

j. Go to the goal section of your PDF form and select the goal Title and on ***CTRL C*** on the keyboard.


Title and description / Goal action items
Translate the P3C User Guide in French
Have the first draft of the P3C User Guide ready by the end
Due: 03/31/2013
goal title
Measures of Success
Have the first draft ready for review.

k. On the evaluation form of Halogen, bring the cursor in the box where the goal title must be typed and simutaneously press on ***CTRL V*** to insert the goal title.



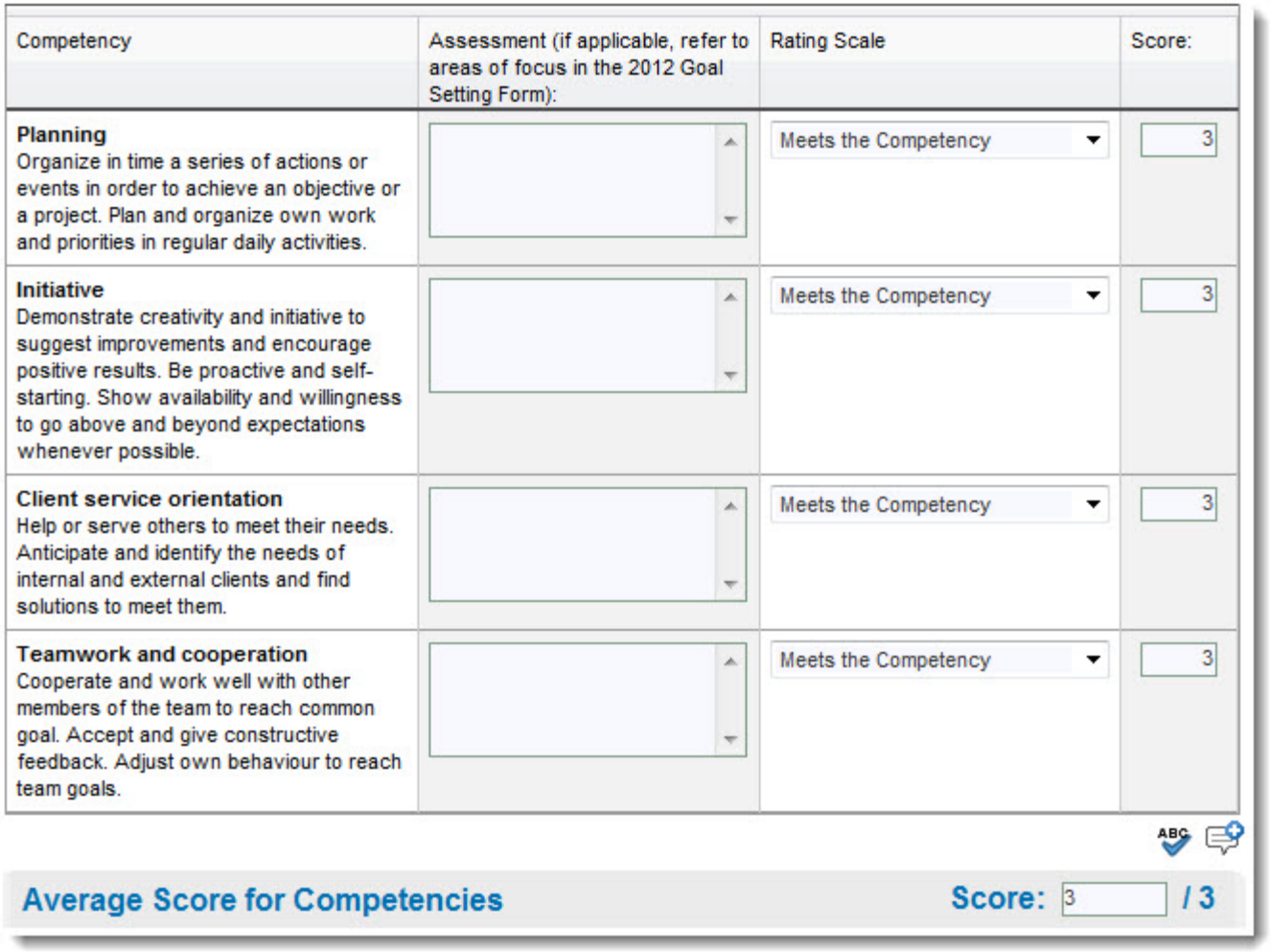
l. Redo the preceding step for each part of the form that must be copied and pasted in the annual evaluation form (goal description, measure of success, due date, competencies section and development plan).

m. Click on *Save Draft*.

n. Close the PDF from saved on the desktop once you have completed the cut and paste operation.

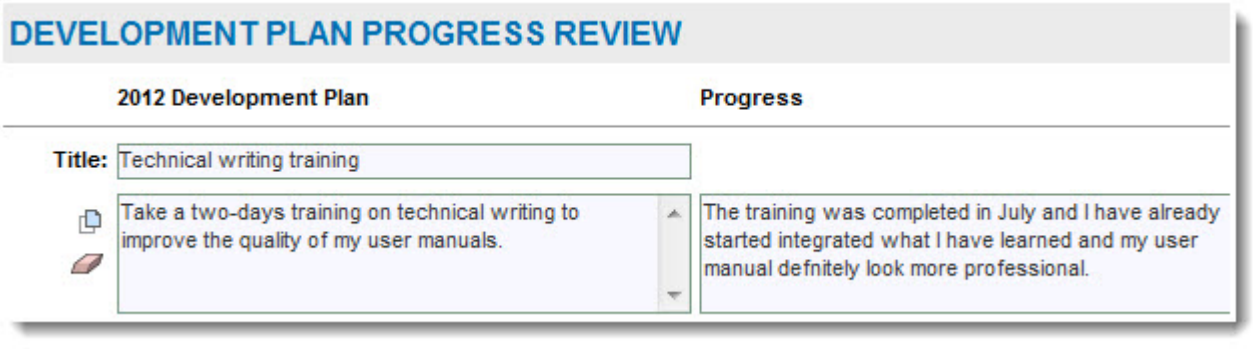
6. The self-appraisal form allows you to enter notes in the key competencies if you have not previously completed the goal setting form. However, if you have added notes to the competencies section when you filled the goal setting form, they will

automatically be imported in the self-appraisal form.



Competency	Assessment (if applicable, refer to areas of focus in the 2012 Goal Setting Form):	Rating Scale	Score:
Planning Organize in time a series of actions or events in order to achieve an objective or a project. Plan and organize own work and priorities in regular daily activities.		Meets the Competency	3
Initiative Demonstrate creativity and initiative to suggest improvements and encourage positive results. Be proactive and self-starting. Show availability and willingness to go above and beyond expectations whenever possible.		Meets the Competency	3
Client service orientation Help or serve others to meet their needs. Anticipate and identify the needs of internal and external clients and find solutions to meet them.		Meets the Competency	3
Teamwork and cooperation Cooperate and work well with other members of the team to reach common goal. Accept and give constructive feedback. Adjust own behaviour to reach team goals.		Meets the Competency	3

7. The self-appraisal form allows you to enter a development plan if you have not previously completed the goal setting form. However, if you have completed the goal setting form or you have added development plans from the My Performance tab, they will automatically imported in the self-appraisal form.



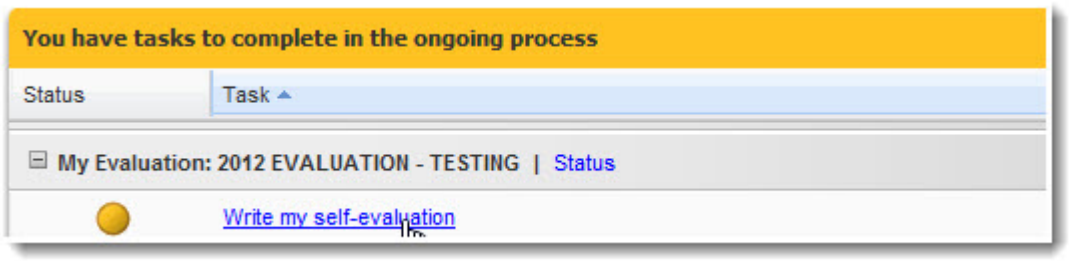
DEVELOPMENT PLAN PROGRESS REVIEW
2012 Development Plan
Progress
Title: Technical writing training
Take a two-days training on technical writing to improve the quality of my user manuals.
The training was completed in July and I have already started integrated what I have learned and my user manual defnitely look more professional.

8. If the rating scale of at least one competency equals Needs improvement, the supervisor *must* complete the PDF form titled **PIP** (performance improvement plan). The supervisor *must* send an email to performance@uottawa.ca to obtain the PIP form. Once the form is completed and signed by the supervisor and then signed by the employee, the PIP form must be send to Human Resources by email to performance@uottawa.ca. The supervisor **must also** add the PIP in the Documents tab on My Performance. Refer to *Adding a document* section of the present guide on how to import a document in Halogen.

Steps for the self-appraisal process

All employees must complete the self-appraisal form in order to complete the annual performance appraisal process. If you have completed the goal setting form or if you have entered your goals and development plans in the My Performance tab, they will appear in the self-appraisal form. However, if yo have not yet entered goals for this year, you will be able to enter them in the next steps.

1. Click on *Write my self-evaluation*.


You have tasks to complete in the ongoing process
Status
Task
My Evaluation: 2012 EVALUATION - TESTING | Status
Write my self-evaluation

2. (Optional) Type a goal title in the box Title.

3. (Optional) Type a detailed description in the box under the goal Title.

4. (Optional) Type a comment in the box Outcome.

5. Enter the date when the goal was achieved in the box Completed.

6. Select the goal Rating.

7. (Optional) Type a Measure of Success.

8. (Optional) Click on *Add Past Goal* and redo steps 2 to 7 if you need to add a goal that has not been entered in the Goal setting form or in the My Performance tab.

9. (Optional) Type a note in the Assessment box of the Planning competency.

10. Using the Rating Scale scroll list, select the achieved level of the Planning competency.

11. (Optional) Type a note in the Assessment box of the Initiative competency.

12. Using the Rating Scale scroll list, select the achieved level of the Iniative competency.

13. (Optional) Type a note in the Assessment box of the Client service orientation competency.

14. Using the Rating Scale scroll list, select the achieved level of the Client service orientation competency.

15. (Optional) Type a note in the Assessment box of the Teamwork and cooperation competency.

16. Using the Rating Scale scroll list, select the achieved level of the Teamwork and cooperation competency

17. (Optional) Type a Development Plan Title in the box.

18. (Optional) Type a detailed description in the box under Development PlanTitle.

19. (Optional) Type a comment in the Progress box.

20. (Optional) Type a comment related to your performance in the Employee's Comments box (you can also wait to enter your comment when you give your final approval to the appraisal).

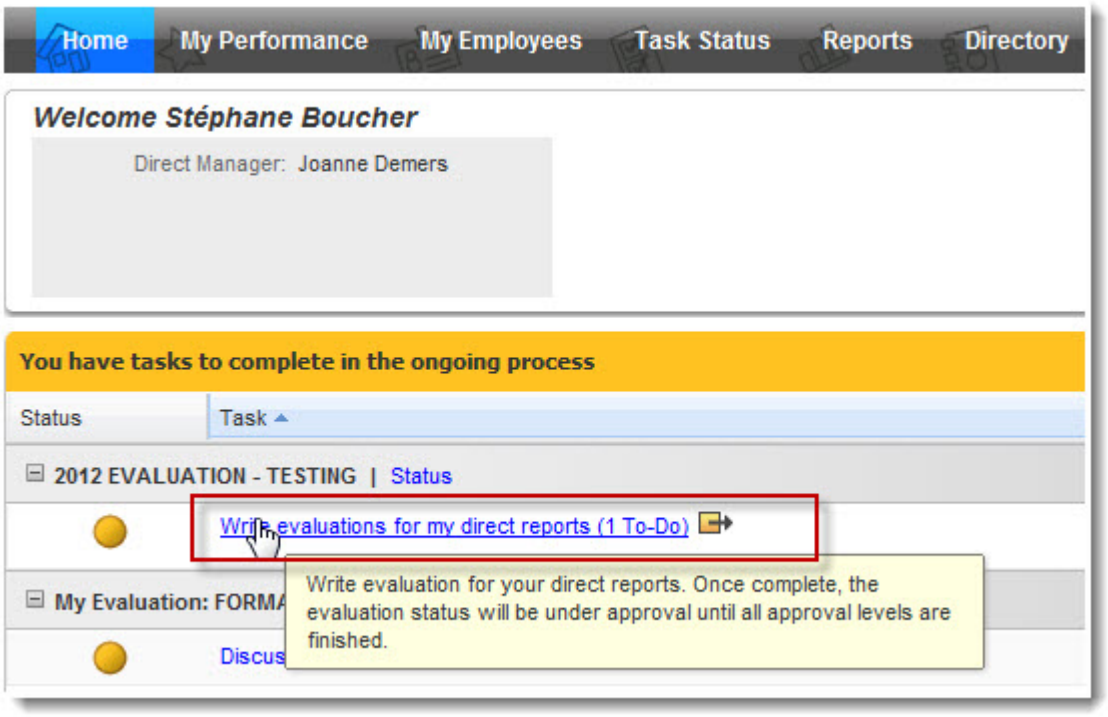
21. Click on *Save Draft* to save your form (especially if you still want to modify it later before submitting it to your supervisor).

22. Click on *Submit* when you are ready to send your form to your supervisor.

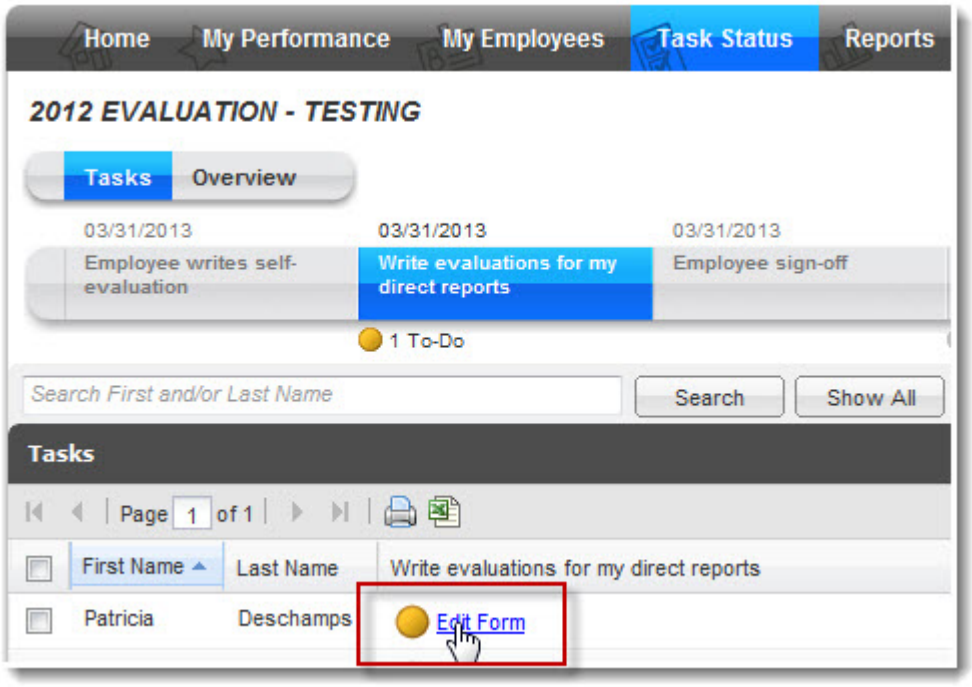
23. Click on *OK* to confirm that you no longer need to modify the form.

Revision of the self-appraisal by the supervisor

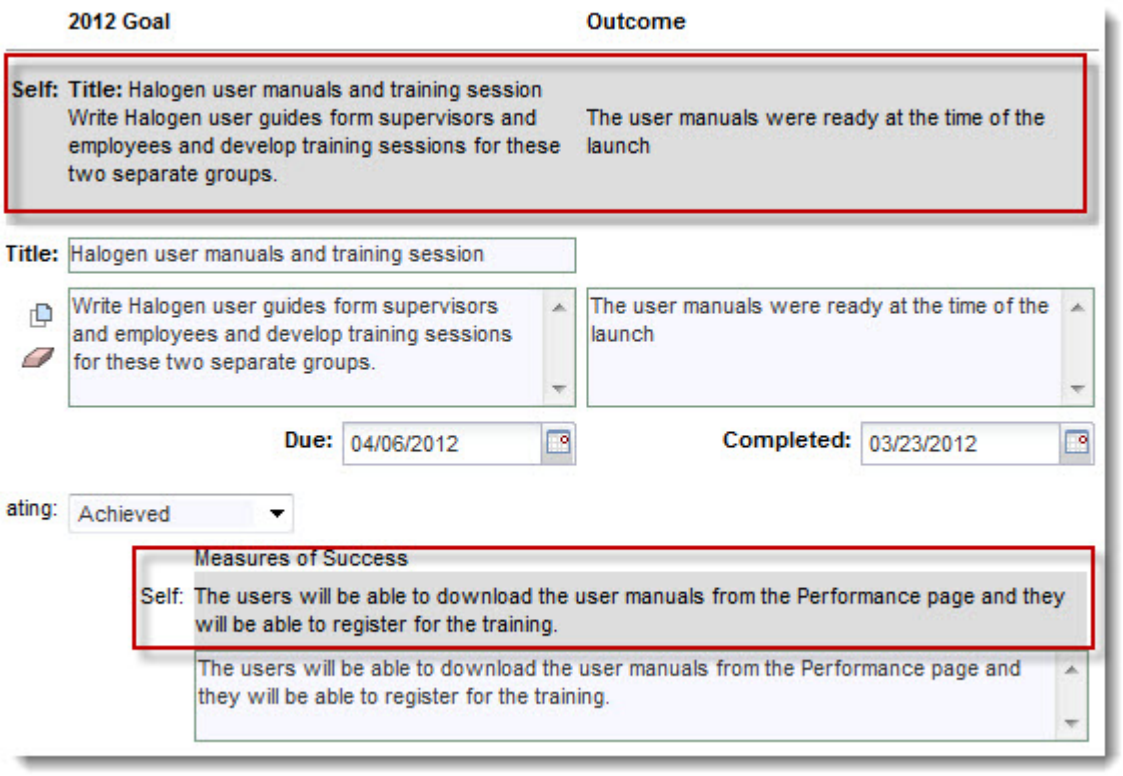
1. Once the self-appraisal form has been submitted by the employee, it is assigned to the supervisor.
2. This step is started on the Home tab by clicking on *Write evaluations for my direct reports*.


Home
My Performance
My Employees
Task Status
Reports
Directory
Welcome Stéphane Boucher
Direct Manager: Joanne Demers
You have tasks to complete in the ongoing process
Status
Task
2012 EVALUATION - TESTING | Status
Write evaluations for my direct reports (1 To-Do)
Write evaluation for your direct reports. Once complete, the evaluation status will be under approval until all approval levels are finished.
My Evaluation: FORMA
Discus

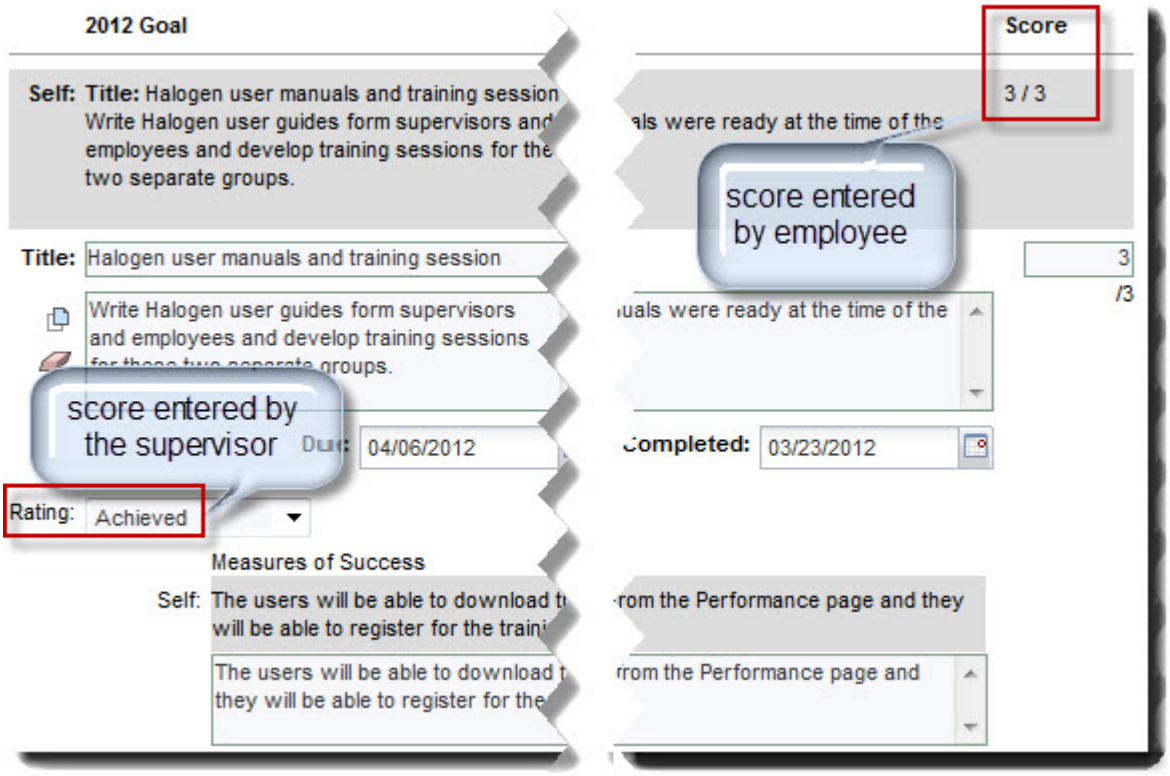
3. As soon as the supervisor clicks on Write evaluations for my direct reports, the Task Status opens and the supervisor can see at which step of the process he or she currently is. The supervisor clicks on *Edit Form* to begin the step.



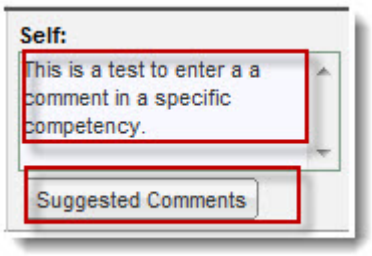
4. The form displays what was written by the employee in shaded areas titled Self. The supervisor can modify the content using the boxes under the shaded areas.


2012 Goal
Outcome
Self: Title: Halogen user manuals and training session
Write Halogen user guides form supervisors and employees and develop training sessions for these two separate groups.
The user manuals were ready at the time of the launch
Title: Halogen user manuals and training session
Write Halogen user guides form supervisors and employees and develop training sessions for these two separate groups.
The user manuals were ready at the time of the launch
Due: 04/06/2012
Completed: 03/23/2012
ating: Achieved
Measures of Success
Self: The users will be able to download the user manuals from the Performance page and they will be able to register for the training.
The users will be able to download the user manuals from the Performance page and they will be able to register for the training.

5. The score entered by the employee for each goal is also displayed in the Self shaded area. The supervisor must select the level of achievement using the Rating drop-down list of the Goal section.

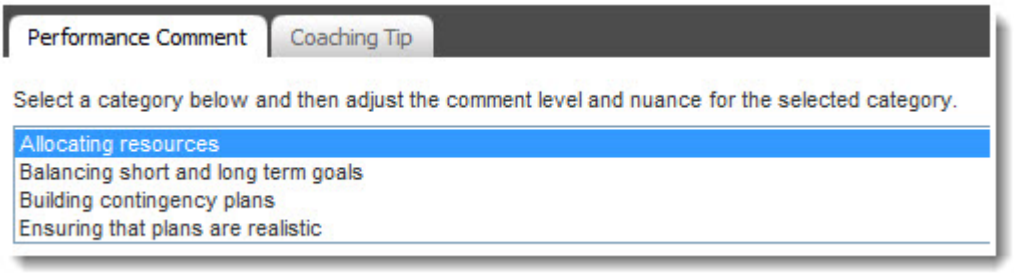

2012 Goal
Score
Self: Title: Halogen user manuals and training session
Write Halogen user guides form supervisors and
employees and develop training sessions for the
two separate groups.
3 / 3
score entered by employee
Title: Halogen user manuals and training session
3
/3
Write Halogen user guides form supervisors
and employees and develop training sessions
score entered by the supervisor
Due: 04/06/2012
Completed: 03/23/2012
Rating: Achieved
Measures of Success
Self: The users will be able to download t
will be able to register for the traini
rom the Performance page and they
The users will be able to download t
they will be able to register for the
rom the Performance page and

6. The supervisor can enter comments for each key competency in the boxes located under the word Self: . If the employee has added a note in Area of focus on the Goal setting form, it will be displayed beside the word Self: .



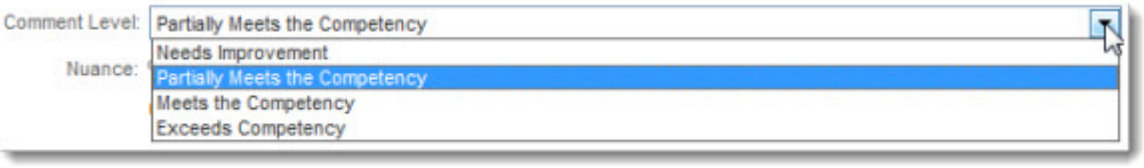
7. The supervisor can get a list of suggested comments to insert in the key competencies section by clicking on Suggested Comments. The following steps explains how to get a list of suggested comments.

   a. Select the category of comment that applies to the employee's position in relation to the compency.

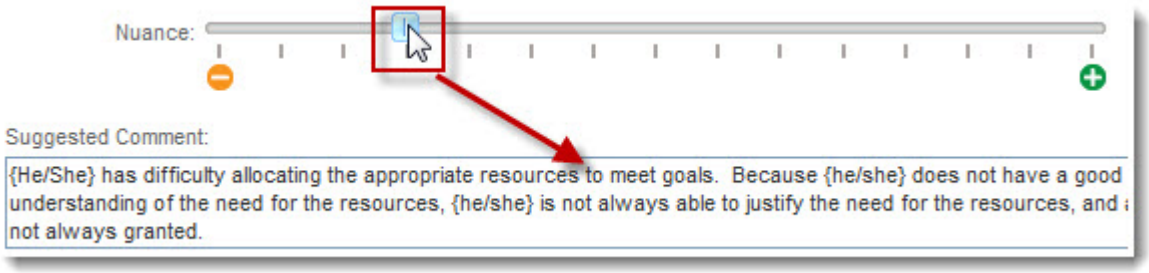

Performance Comment
Coaching Tip
Select a category below and then adjust the comment level and nuance for the selected category.
Allocating resources
Balancing short and long term goals
Building contingency plans
Ensuring that plans are realistic

b. Select the employee's gender.

c. Select the achieved level by the employee.



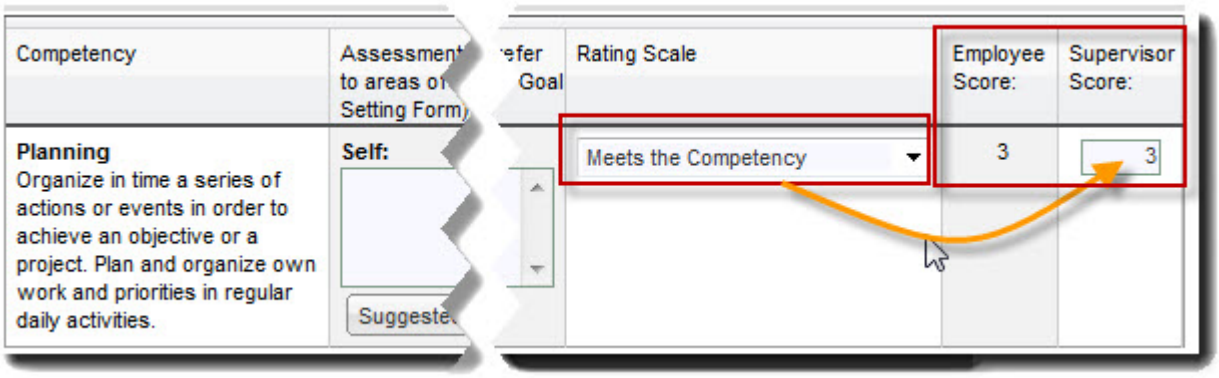
d. Ajust the nuance by sliding the scale bar in order to display the various comments that can be inserted. By sliding the scale bar to the right, you will notice that the suggested comment get more elaborate and more positive.


Nuance:
Suggested Comment:
{He/She} has difficulty allocating the appropriate resources to meet goals. Because {he/she} does not have a good understanding of the need for the resources, {he/she} is not always able to justify the need for the resources, and
not always granted.

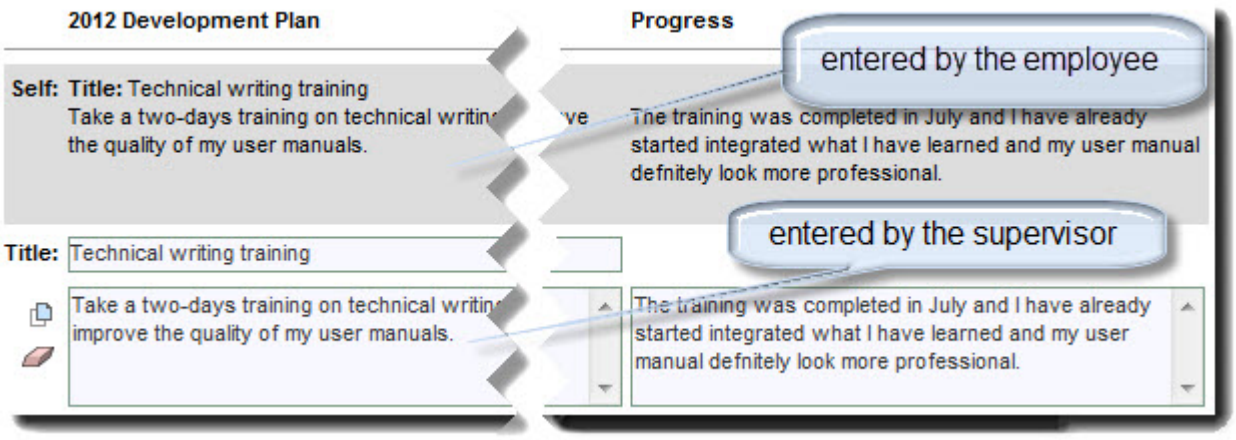
e. Click on *Add to your comment* in order to insert the suggested comment at the end of the existing one.

f. Click on OK.

8. The system displays both the score given by the employee and by the supervisor.



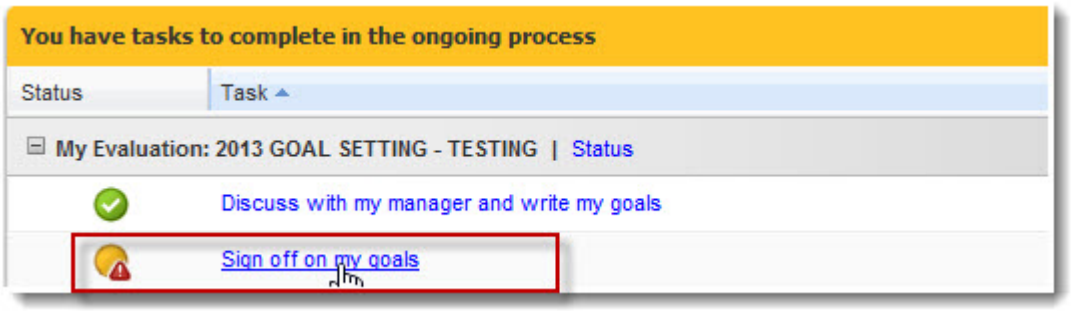
9. The system displays the development plan entered by the employee in the Self: shaded area but the supervisor can add a plan and/or a comment in the appropriate boxes under the Self: section if the employee has not entered one.


2012 Development Plan
Progress
entered by the employee
Self: Title: Technical writing training
Take a two-days training on technical writing
the quality of my user manuals.
The training was completed in July and I have already started integrated what I have learned and my user manual defnitely look more professional.
entered by the supervisor
Title: Technical writing training
Take a two-days training on technical writing
improve the quality of my user manuals.
The training was completed in July and I have already started integrated what I have learned and my user manual defnitely look more professional.

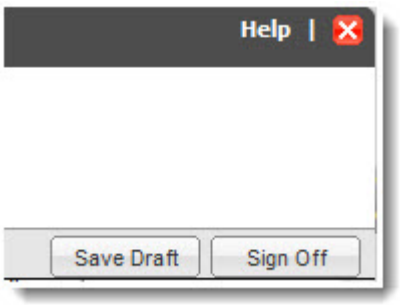
Employee final approval

Once a supervisor has reviewed and approved an employee's goal setting form, the supervisor sends the form to the employee for approval. The employee must:

1. Click *Sign off on my goals*.


You have tasks to complete in the ongoing process
Status
Task
My Evaluation: 2013 GOAL SETTING - TESTING | Status
Discuss with my manager and write my goals
Sign off on my goals

2. Click on Save Draft.

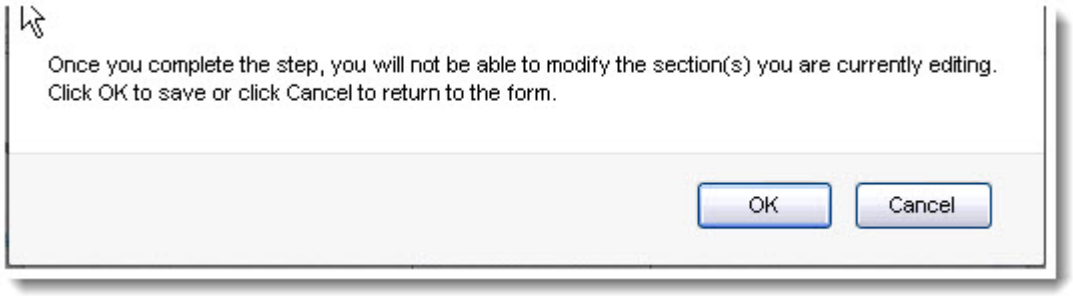


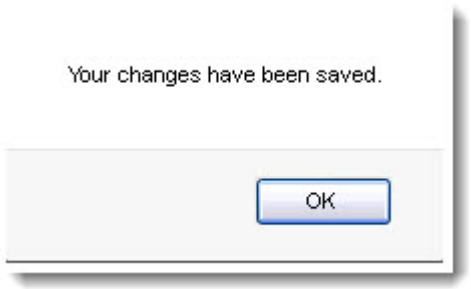
3. Click on OK.

4. Click on Sign Off.

   If you click on Sign Off the form is saved and the process is completed. You cannot modify the form once it has been signed off.

5. Click on OK.

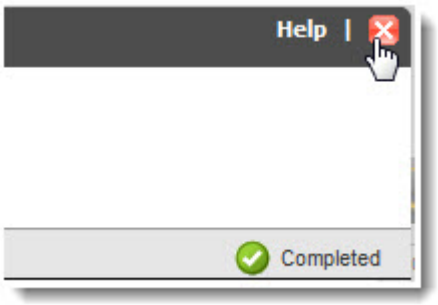

Once you complete the step, you will not be able to modify the section(s) you are currently editing.
Click OK to save or click Cancel to return to the form.
OK
Cancel

6. 

Click on OK.

The system will the task with a completed status.

7. Click on the red X to close the form.



Performance Improvement Plan (P.I.P.)

Performance Improvement Plan(P.I.P)

The performance improvement plan must be completed when the employee obtains Needs Improvement in at least one of the key competencies.

1. The process is not automatically assigned to each employee and supervisor, it is assigned upon request only when the need arises.

   The supervisor must send an email to the address performance@uottawa.ca requesting that the P.I.P. process be assigned to himself/herself and to the concerned employee.

2. The P.I.P. is a process containing three steps.

3. The three steps of the P.I.P. are:

   a. The supervisor writes the P.I.P. and submits the form.

   b. The employee signs off.

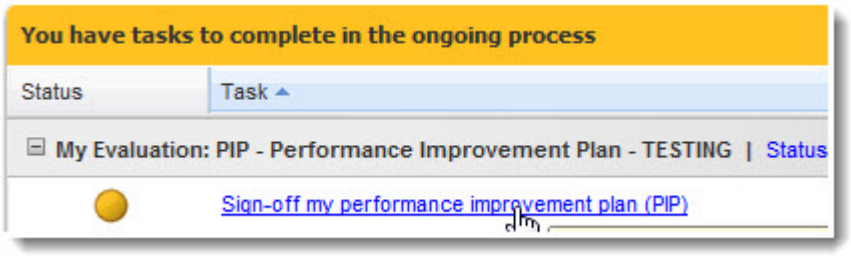
   c. The supervisor signs off.

Steps of the P. I. P.

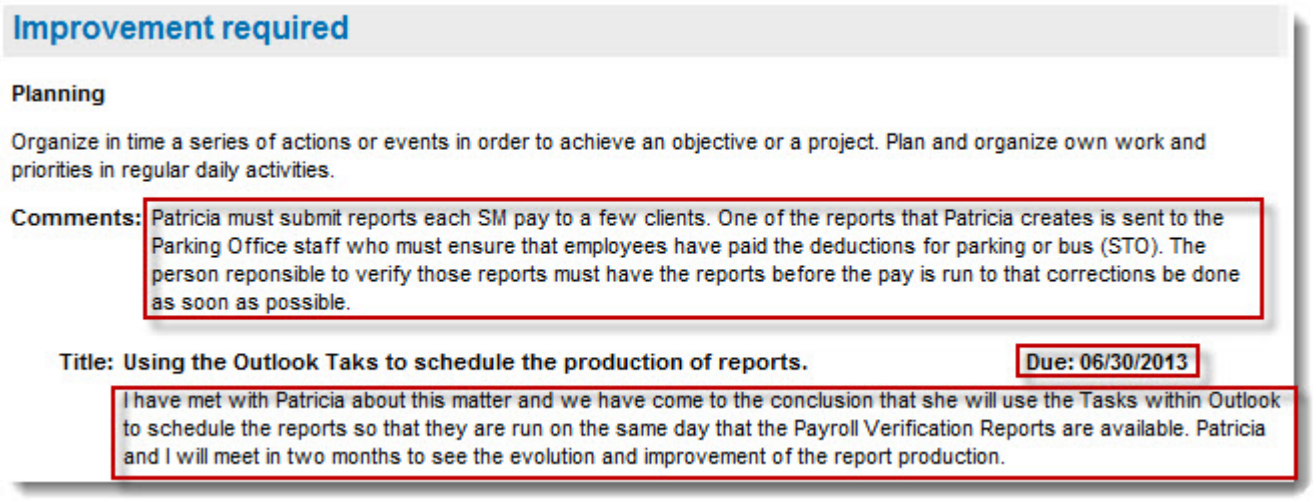
Some steps are completed by the supervisor, others are done by the employee and the process is completed when the form is signed electronically by the supervisor.

1. **Note:**
   The next steps are completed by the employee who needs to sign off his/her P.I.P.

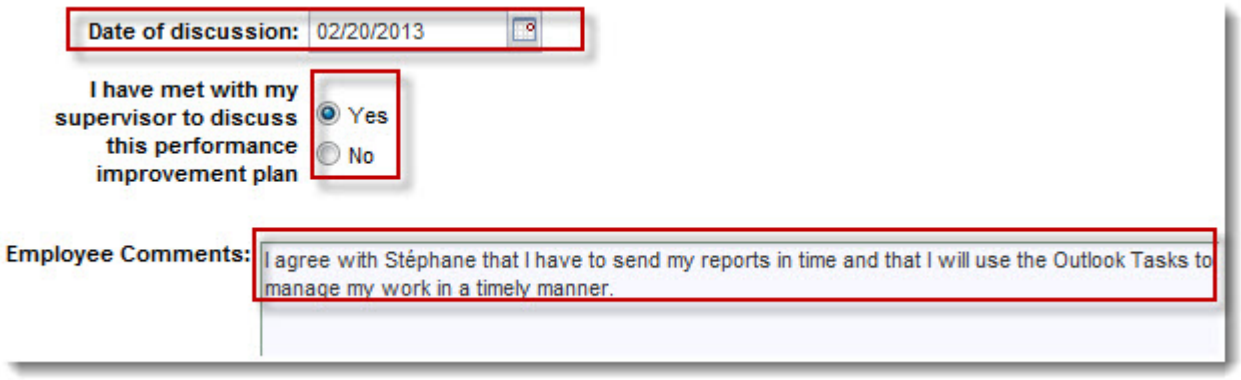
   Click on Sign-off my performance improvement plan (PIP).


You have tasks to complete in the ongoing process
Status
Task
My Evaluation: PIP - Performance Improvement Plan - TESTING | Status
Sign-off my performance improvement plan (PIP)

2. Read the comments added by the supervisor in each competency that need to be improved.


Improvement required
Planning
Organize in time a series of actions or events in order to achieve an objective or a project. Plan and organize own work and priorities in regular daily activities.
Comments:
Patricia must submit reports each SM pay to a few clients. One of the reports that Patricia creates is sent to the Parking Office staff who must ensure that employees have paid the deductions for parking or bus (STO). The person reponsible to verify those reports must have the reports before the pay is run to that corrections be done as soon as possible.
Title: Using the Outlook Taks to schedule the production of reports.
Due: 06/30/2013
I have met with Patricia about this matter and we have come to the conclusion that she will use the Tasks within Outlook to schedule the reports so that they are run on the same day that the Payroll Verification Reports are available. Patricia and I will meet in two months to see the evolution and improvement of the report production.

3. Enter the date when you have met with your supervisor to discuss the P.I.P. in the field Date of discussion


Date of discussion: 02/20/2013
I have met with my supervisor to discuss this performance improvement plan
Yes
No
Employee Comments:
I agree with Stéphane that I have to send my reports in time and that I will use the Outlook Tasks to manage my work in a timely manner.

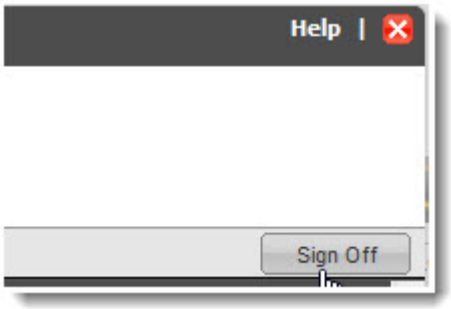
.

4. Click sur Yes or No of the option I have met with my supervisor to discuss this performance improvement plan.

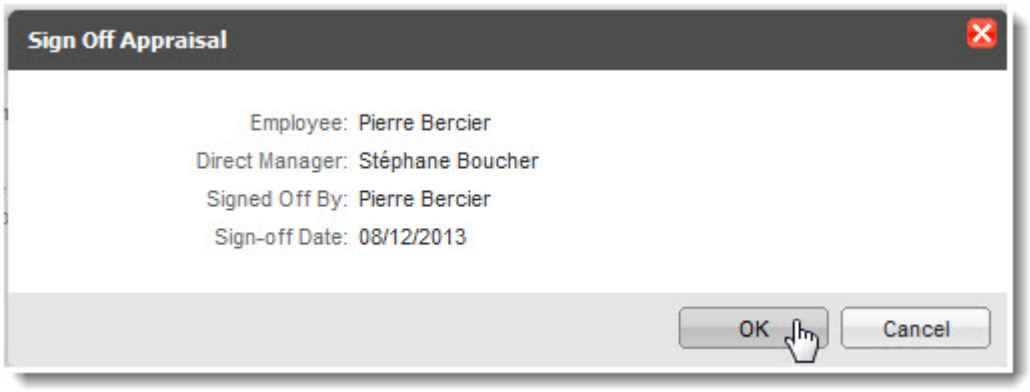
5. (Optional) Type a comment in the Employee Comments box.

6. Click on Save Draft.

7. Clic, k on Sign Off.

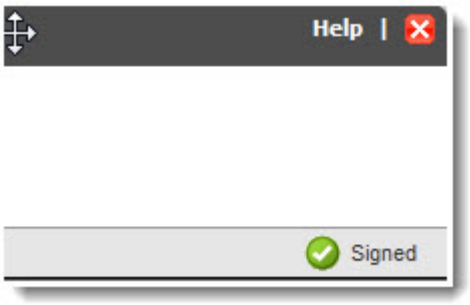


8. Click on OK.



The system will display the task as a completed status.

9. Click on the red X to close the form.



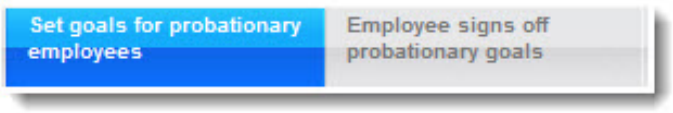
Probation

Beginning of Probation Period

The probation process is started by writing the probationary goals. The supervisor must meet his employee to discuss the goals that need to be achieved by the end of the probation, the job requirements and key competencies.

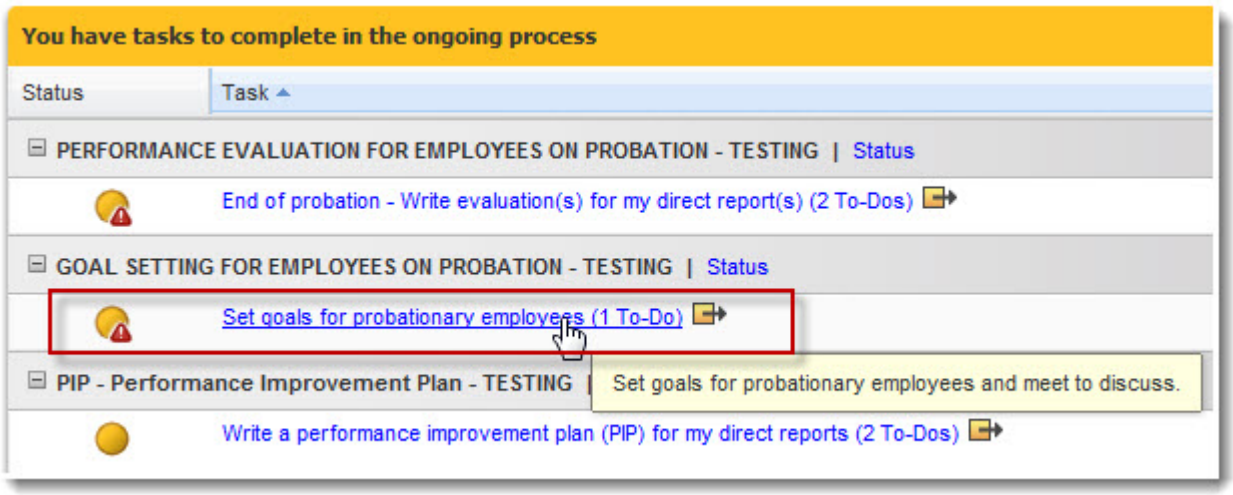
The probation process contains two steps.

1. The supervisor meets the employee to establish the goals during the probation period and to discuss the job requirements and the key competencies on which the employee will be evaluated.
2. The employee signs the goals for the probationary period.

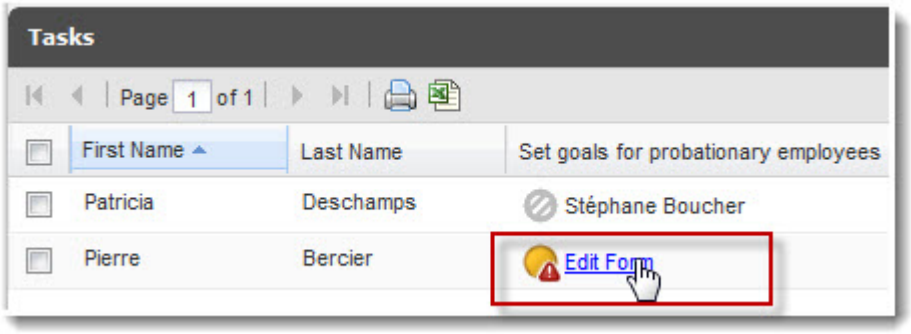


Goal Setting

1. Click on Set Goals for probationary employees.


You have tasks to complete in the ongoing process
Status
Task
PERFORMANCE EVALUATION FOR EMPLOYEES ON PROBATION - TESTING | Status
End of probation - Write evaluation(s) for my direct report(s) (2 To-Dos)
GOAL SETTING FOR EMPLOYEES ON PROBATION - TESTING | Status
Set goals for probationary employees (1 To-Do)
PIP - Performance Improvement Plan - TESTING |
Set goals for probationary employees and meet to discuss.
Write a performance improvement plan (PIP) for my direct reports (2 To-Dos)

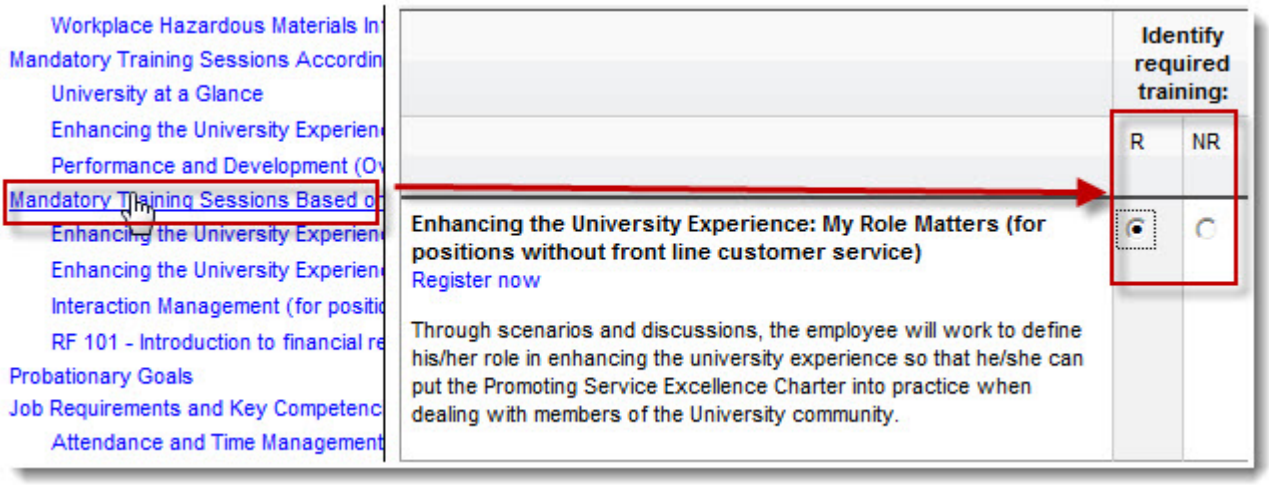
2. Click on Edit Form.



The form is displayed. The supervisor cannot register an employee to a training session, he/she will be able to register when he/she approves his/her probationary goal form.

3. Click on Mandatory Training Sessions Based on the Position Type from the Form Navigator.

4. Click on the option that idendifies whether the training session is mandatory (R) or not required (NR) from the column titled Identify required training.

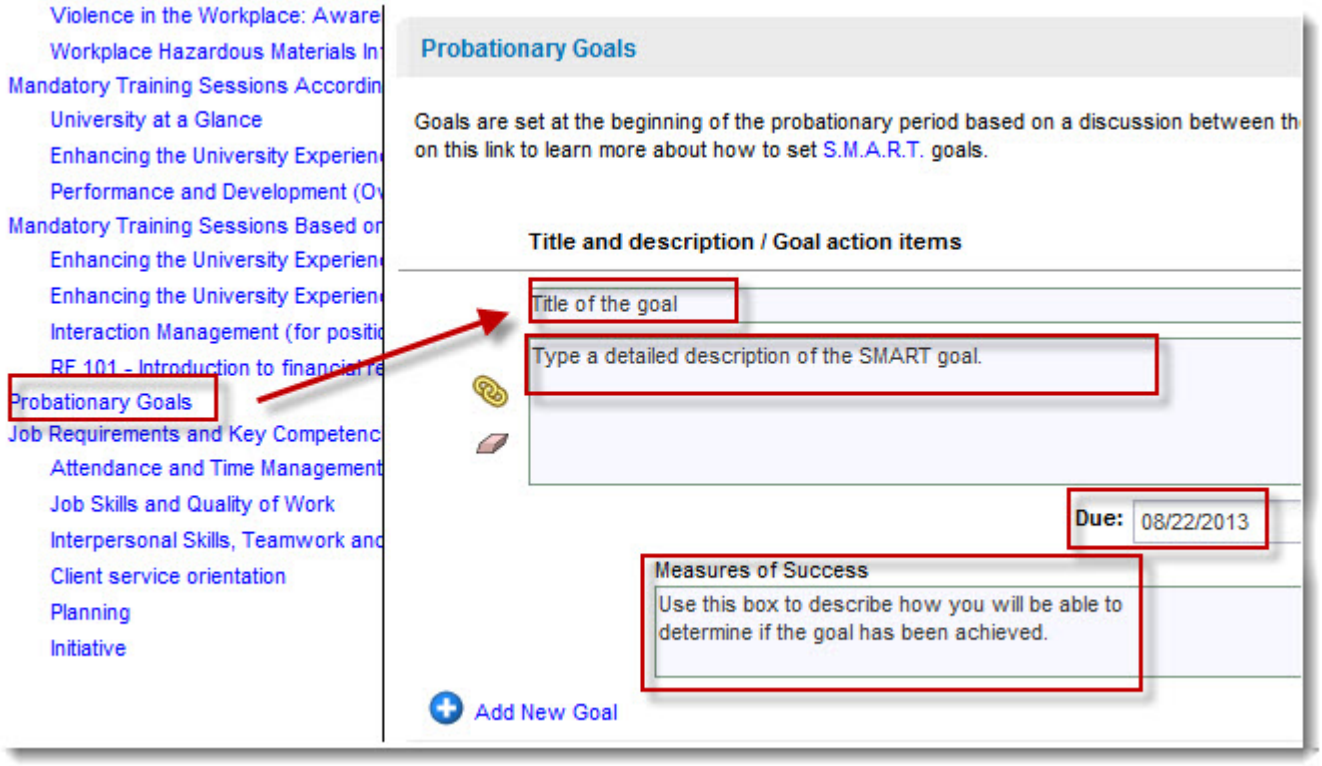

Workplace Hazardous Materials In
Mandatory Training Sessions Accordin
University at a Glance
Enhancing the University Experien
Performance and Development (Ov
Mandatory Training Sessions Based o
Enhancing the University Experien
Enhancing the University Experien
Interaction Management (for positi
RF 101 - Introduction to financial re
Probationary Goals
Job Requirements and Key Competenc
Attendance and Time Management
Identify required training:
R
NR
Enhancing the University Experience: My Role Matters (for positions without front line customer service)
Register now
Through scenarios and discussions, the employee will work to define his/her role in enhancing the university experience so that he/she can put the Promoting Service Excellence Charter into practice when dealing with members of the University community.

a) (Optional) Add a Comment.

5. Repeat the preceding steps for each training session displayed in the section Mandatory Training Sessions Based on the Position Type.

6. Click on Probationary Goals from the Form Navigator.

7. Type the Title of the Goal in the top box.


Violence in the Workplace: Aware
Workplace Hazardous Materials In
Mandatory Training Sessions Accordin
University at a Glance
Enhancing the University Experien
Performance and Development (Ov
Mandatory Training Sessions Based or
Enhancing the University Experien
Enhancing the University Experien
Interaction Management (for positi
RE 101 - Introduction to financial re
Probationary Goals
Job Requirements and Key Competenc
Attendance and Time Management
Job Skills and Quality of Work
Interpersonal Skills, Teamwork and
Client service orientation
Planning
Initiative
Probationary Goals
Goals are set at the beginning of the probationary period based on a discussion between th
on this link to learn more about how to set S.M.A.R.T. goals.
Title and description / Goal action items
Title of the goal
Type a detailed description of the SMART goal.
Due: 08/22/2013
Measures of Success
Use this box to describe how you will be able to determine if the goal has been achieved.
Add New Goal

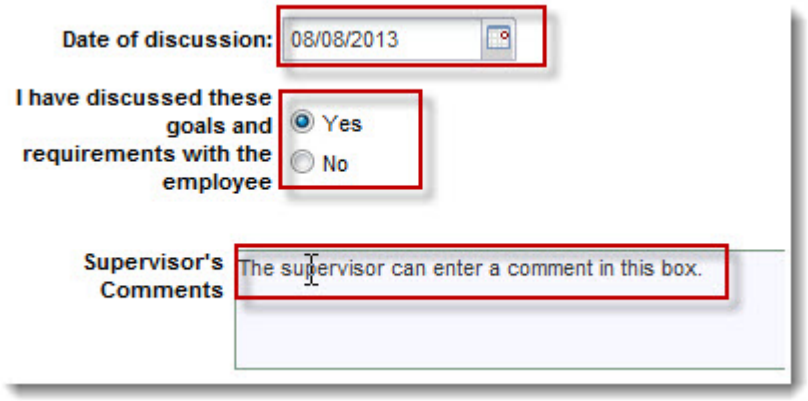
8. Type a detailed Description of the goal and a measure to achieve it, in the second box.

9. Click on the calendar icon of the Due field and select the probation end date.

10. Type a measure of success. The measure of success helps the supervisor and the employee determine if a goal has been achieved or not.

11. (Optional) Click on Add New Goal and repeat the preceding steps.
    You can add up to five goals.

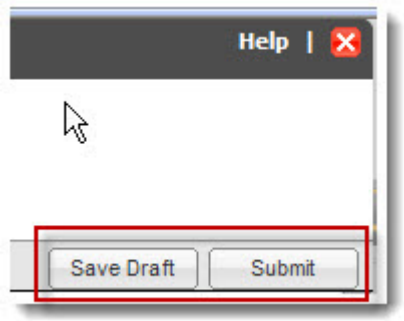
12. Click on the Calendar icon of the Date of discussion field and select the date when you have met with your employee to discuss the trainings to take, the goals, job requirements and key competencies.



13. Click on the I have discussed these goals and the requirements with the employee option.

14. (Optional) Type a comment in the Supervisor's comments box.

15. Click on Save Draft.

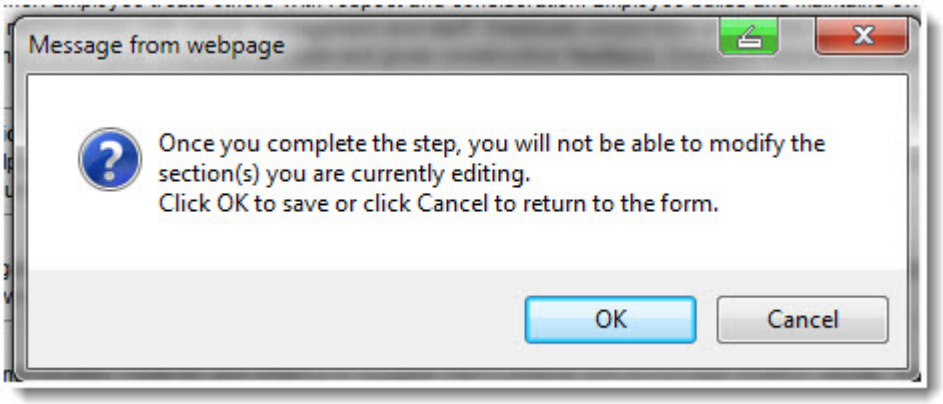


16. Click on OK.

17. Click on Submit.

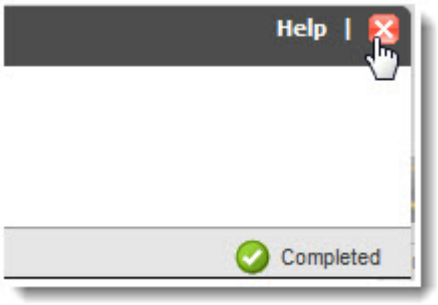
    If you click on Submit, the form is saved and forwarded to the employee for his electronic signature. The form can no longer be modified once it has been submitted.

18. Click on OK.


Message from webpage
Once you complete the step, you will not be able to modify the section(s) you are currently editing.
Click OK to save or click Cancel to return to the form.
OK
Cancel

You will not be able to modify the form once it has been submitted. The system will indicate that the step has a status of completed.

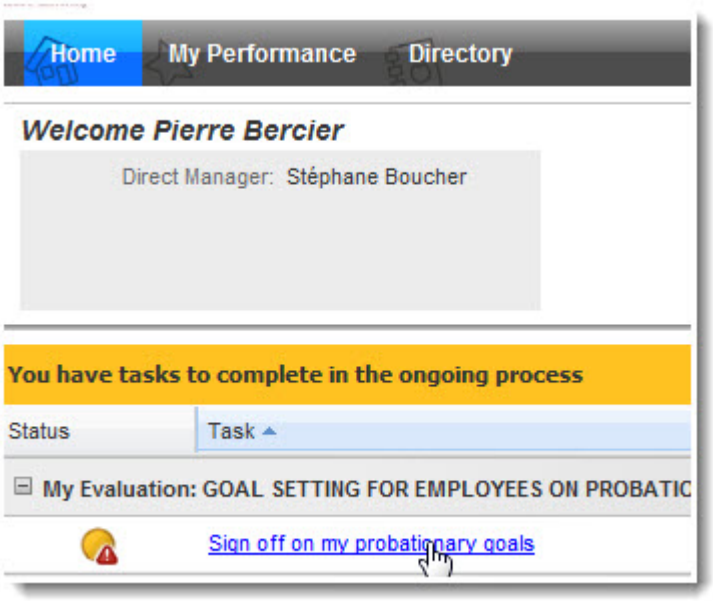
19. Click on the red X to close the form.



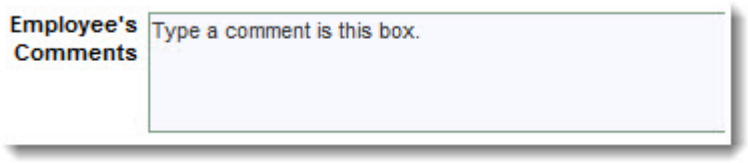
Approval of probation goals

The supervisor has filled the form to establish the probationary goals, he/she submits the form to his employee in order for him/her to electronically sign it.

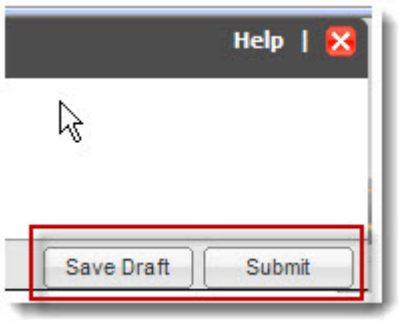
1. Click on Sign off on my probationary goals.



2. (Optional) Type a comment in the Employee's Comments box.



3. Click on Save Draft.

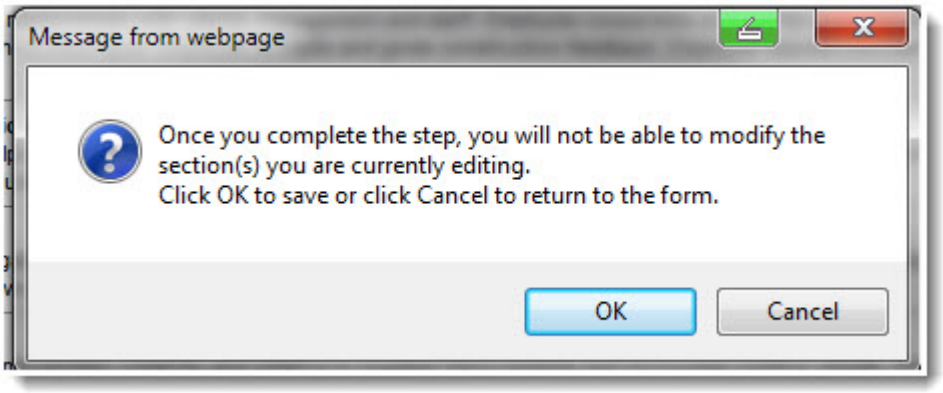


4. Click on OK.

5. Click on Submit.
   If you click on Submit the form is saved and the process is completed. The form cannot be modified once it has been submitted.

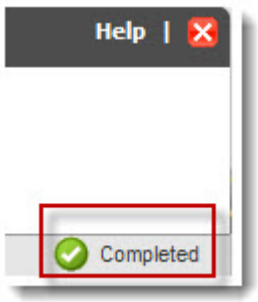
6. Click on OK.

7. Click on Ok.


Message from webpage
Once you complete the step, you will not be able to modify the section(s) you are currently editing.
Click OK to save or click Cancel to return to the form.
OK
Cancel

   You cannot modify the form after you click on OK. The system will display the completed status.

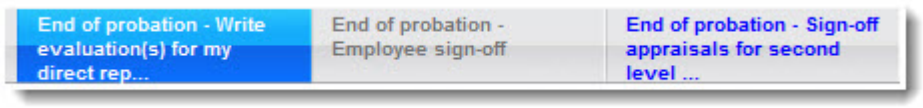
8. Click on the red X to close the form.



End of probation period

The performance evaluation for employees on probation process completes the probation process.

The performance evaluation for probation has three steps.

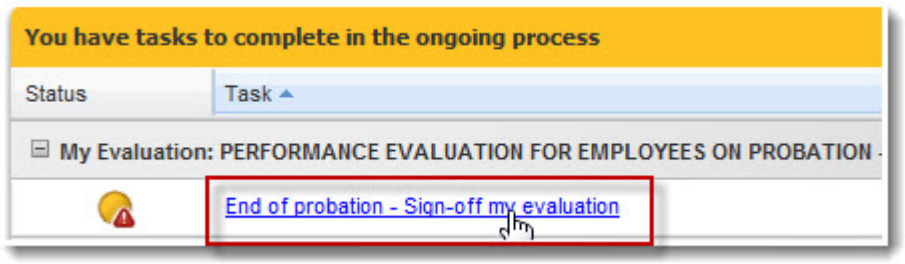

End of probation - Write evaluation(s) for my direct rep...
End of probation - Employee sign-off
End of probation - Sign-off appraisals for second level ...

1. The supervisor writes the end of probation evaluation form.
2. The employee signs off the evaluation form.
3. The second-level supervisor signs off the form.

Signature of the End of Probation Evaluation Form

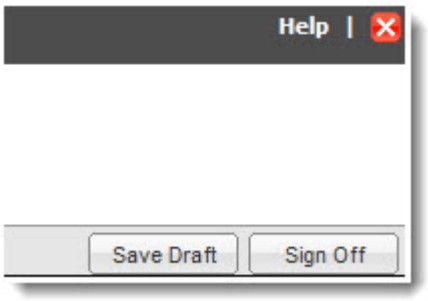
The second step of the end of probation process must be completed by the employee. This step is necessary because it enables the employee to electronically sign the end of probation form and to add a comment.

1. Click on End of probation - Sign-off my evaluation.


You have tasks to complete in the ongoing process
Status
Task
My Evaluation: PERFORMANCE EVALUATION FOR EMPLOYEES ON PROBATION
End of probation - Sign-off my evaluation

2. (Optional) Type a comment in Employee's Comments.

3. Click on Save Draft.

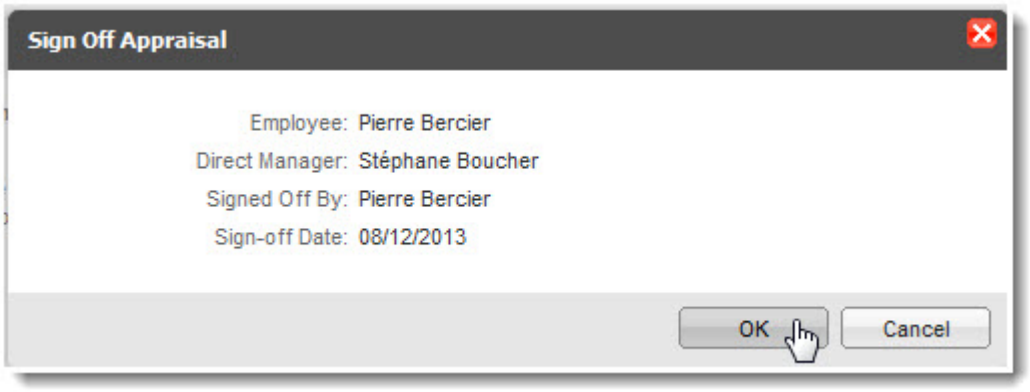


4. Click on OK.

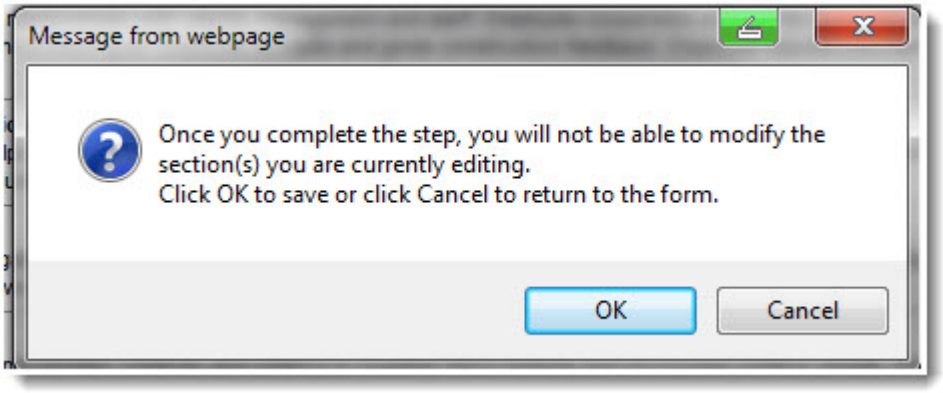
5. Click on Sign Off.

   If you click on Sign Off the form is saved and the process is completed. You cannot modify the form once it has been signed off.

6. Click on OK.

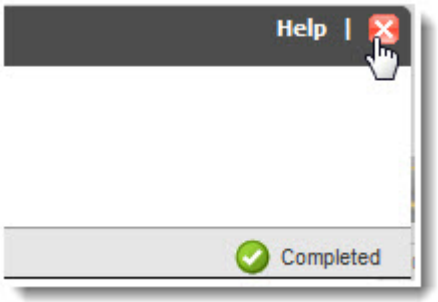


7. Click on OK.


Message from webpage
Once you complete the step, you will not be able to modify the section(s) you are currently editing.
Click OK to save or click Cancel to return to the form.
OK
Cancel

The system will the task with a completed status.

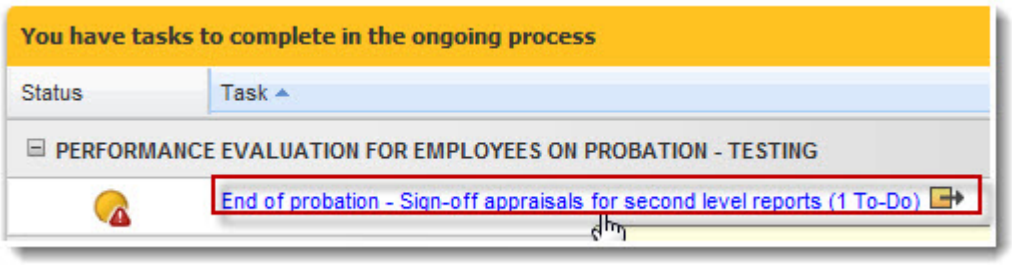
8. Click on the red X to close the form.



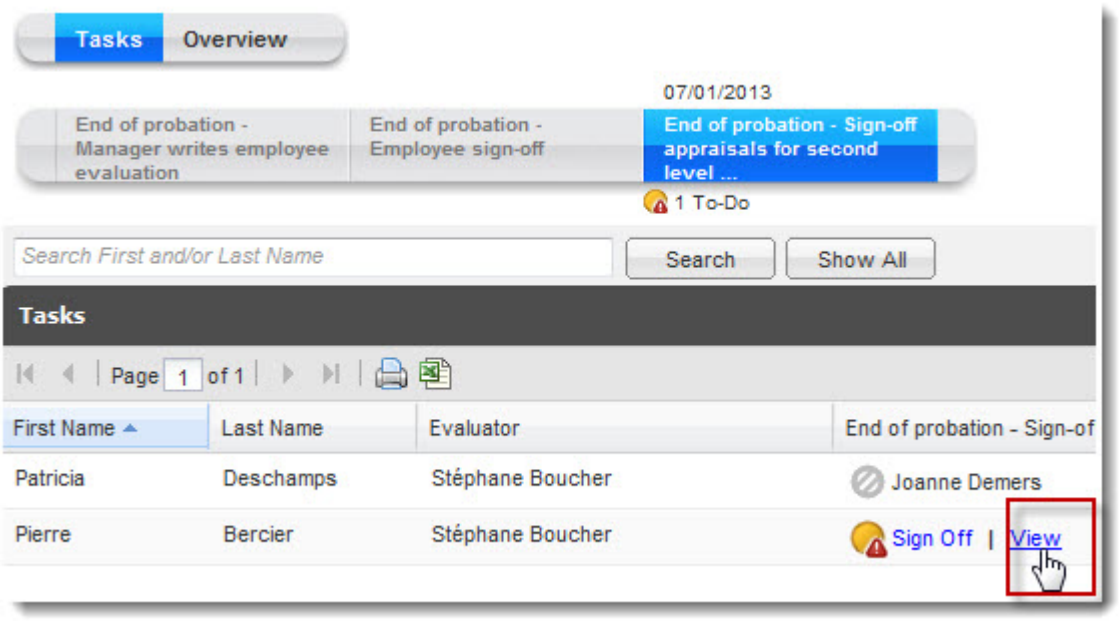
Second Level Supervisor Approval

The second level supervisor must sign off the form to complete the end of probation process. At this point, no modifications can be made to the form. The second level supervisor can only review the content and sign off.

1. Click on End of probation - Sign-off appraisals for second level reports.

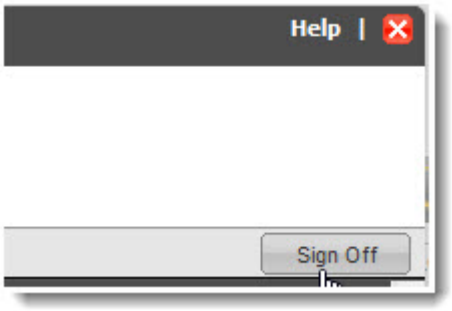

You have tasks to complete in the ongoing process
Status
Task
PERFORMANCE EVALUATION FOR EMPLOYEES ON PROBATION - TESTING
End of probation - Sign-off appraisals for second level reports (1 To-Do)

2. Click on View.

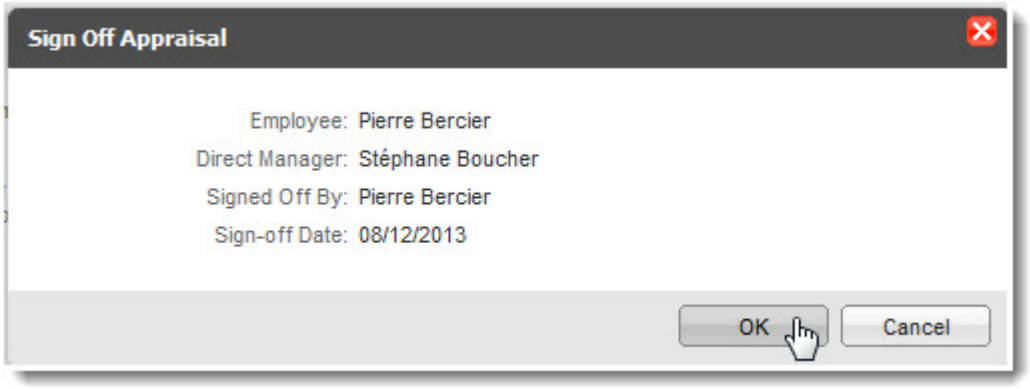


If you click on Sign Off, the system will ask you to sign off without reviewing the content of the form.

3. Click on Sign Off.

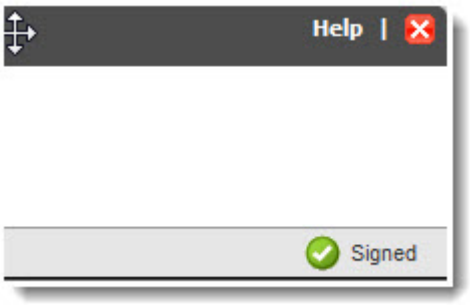


4. Click on OK.



The system will display the task as a completed status.

5. Click on the red X to close the form.


Help
Signed